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THE NETHERLANDS: A POSTWAR PICTURE (pages 2-20)

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cover Through the great port of Rotterdam, second only to New York, products of Netherlands agriculture and industry move out to world markets and goods from many countries reach Dutch industry and consumers. Massed in the foreground are Rhine barges that navigate the waterways connecting Rotterdam with the heart of Europe. For a study of the Netherlands as producer and consumer, see the articles on pages 2 to 20.

2 The Netherlands: a Postwar Picture . . . *the sturdy windmill typifies the old agricultural Holland still surviving; the oil derrick, the upsurge of industry there.*

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11 Bulb-Growers Sell Beauty . . . *and have built a thriving business on the lift that spring flowers bring to the winter-weary.*

13 Wanted: Raw Materials . . . *with few resources itself, the Netherlands looks to countries like Canada to supply what its industries must have.*

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CANADA

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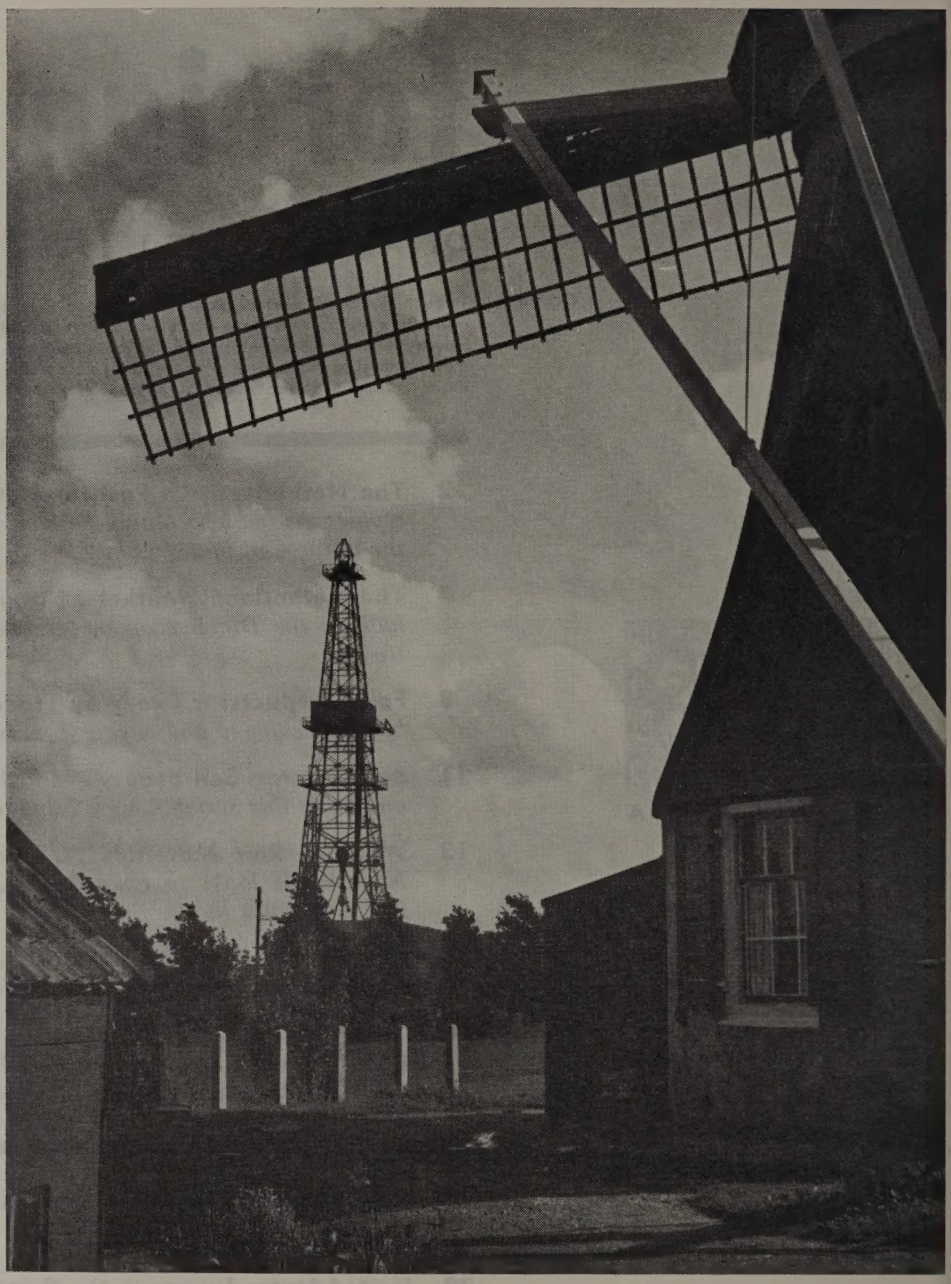

The Netherlands: a Postwar Picture

The Netherlands Market

Population pressure, lack of natural resources turn Dutch towards processing of imported raw materials and determine what Netherlands buys. Rising national income, growing foreign trade make this an expanding market. Following pages picture Dutch postwar development and relates it to Canadian interests.

Farm Products: a Two-Way Trade

Fertile Dutch soils, well adapted to mixed farming, provide up to 40 per cent of exports. Large imports of agricultural products still needed; Holland has become good customer for Canadian cereals, oilseeds.

Bulb-Growers Sell Beauty

With over 8,000 hybrid varieties of flower bulbs to offer, Dutch growers have become pre-eminent; quality control, skilful advertising have brought success. Canada ranks as important market for their products.

Wanted: Raw Materials

. . . to keep wheels of Dutch industry turning. Purchases of raw materials for finishing or converting rise with industrial growth, flow of foreign capital into Holland. What are industry's leading imports? What does Canada supply?

How the Retail Trade Buys

Department stores, chain stores, specialty stores each have specialized buying practices that Canadian exporters should understand before trying out this market.

Land from the Sea

Biggest project in Holland's long struggle to wrest land from North Sea will ease overcrowding, help irrigation, other projects. Skilled Dutch engineers apply in other countries the knowledge gained at home.

Will Dutch Use Nuclear Power?

Urgent need for industrial fuels is pushing study of nuclear power reactors; research models already at work, plans going forward for first full-scale reactor.

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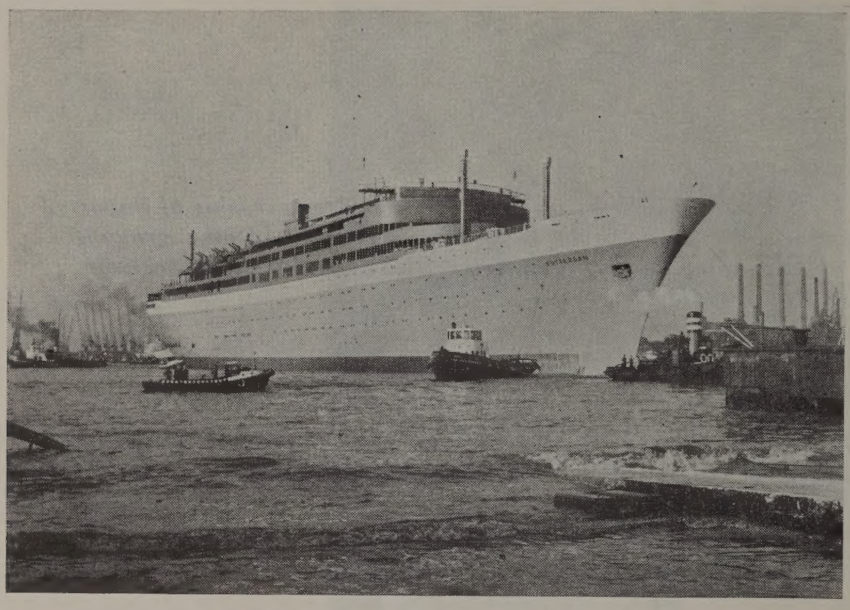

The "Rotterdam", new flagship of the Holland-America Line that will go into service next month, symbolizes the industrial achievement of the Netherlands and its recovery from the ravages of war. Canada had a share in the ship's construction, supplying the aluminum used in the superstructure.

The Netherlands Market

W. R. HICKMAN, *Commercial Secretary, The Hague.*

BORDERED by Germany to the east, Belgium to the south, and facing the North Sea to the north and west, the Netherlands spans the deltas of three important rivers—the Rhine, the Meuse, and the Scheldt. World commerce therefore finds in this small country ready access to Europe's industrial hinterland and Holland has become, naturally enough, one of the leading centres of international shipping and transport. Despite its northern latitude, the climate is temperate and the rainfall abundant; there is no winter navigation problem.

Population

The Netherlands has a total land area of just under 13,000 square miles but this supports a population of over 11 million, largely concentrated in the western part of the country. Holland therefore has the world's greatest population density of about 860 to the square mile. (This is in startling contrast to Canada's eight per square mile, excluding the Territories.) Because the birth rate is high and the death rate low, the population is increasing by about 150 thousand a year, a problem to which the Dutch are giving a great deal of attention. The main commercial centres are Amsterdam and Rotterdam; these are also extremely busy ports. Other large cities include Utrecht, The Hague, Arnhem, Nymegen, and Eindhoven. Industry is fairly widely dispersed throughout the country.

About one-quarter of the land in the Netherlands, containing more than half the population, lies below sea level and a system of dykes, pumping stations and drainage canals protects it from the sea. Much of the land is well suited to intensive agriculture and the climate too is favourable; in some areas, successive crops of four to five different vegetables can be raised from the same plot in one year. Large additional tracts of land are being reclaimed from the North Sea (see article on page 17) and this will help to ease the growing pressure of population to some extent. The following table shows the land utilization:

LAND UTILIZATION IN THE NETHERLANDS

(in per cent)

Agriculture and forestry		79
Grassland	40	
Arable land	28	
Horticulture	4	
Forestry	7	
Wasteland (sand dunes, marsh, etc.)		6
Water (lakes, canals, etc.)		6.5
Railways and roads		2.5
Industry, commercial and residential		6
		100

Economic Life

Agriculture uses about 80 per cent of the land (as the table above shows), accounts for about 12 per cent of the gross national product, and employs about 1

per cent of the labour force. It contributes from 30 to 40 per cent of all exports. Fishing, another traditional Dutch occupation, yields an average catch of 200 thousand metric tons a year, most of which is exported, particularly fresh or salt herring and shellfish.

The Netherlands lacks any extensive mineral resources but it does produce about 11 million tons of coal, 650 thousand tons of salt, and some 1.6 million tons of crude oil (about 25 per cent of domestic consumption). In addition, large quantities of imported crude are refined at Pernis, near Rotterdam, for export as petroleum products. These exports total some ten million tons a year and the country now ranks second among European exporters of refinery products. (For further details, see "Holland's Oil Industry" in the January 31, 1959, issue of *Foreign Trade*.)

Secondary Manufacturing Growing

Secondary manufacturing is playing an increasingly important role in the Dutch economy and is particularly advanced in such fields as shipbuilding, industrial machinery and equipment, electrical apparatus, chemicals and pharmaceuticals, paper and strawboard, rubber, leather, textiles, glassware and pottery, and the processing of agricultural products from home and abroad. As the article on page 13 explains, industrial expansion has featured the country's postwar growth and more than 170 foreign manufacturing establishments of various kinds have been attracted. Based for the most part on imported raw materials, these industries must pay their way in export markets to earn necessary foreign exchange, in addition to meeting the needs of the Dutch themselves.

Trade Services

Shipping and trade services are other means by which the Dutch help to pay for needed imports. A seafaring nation by tradition, Holland's location at the gateway to western Europe has been turned to good account in the building up of a modern merchant fleet numbering 1,600 vessels with a gross registered tonnage of 4.6 million (the world's seventh largest), extensive storage and bulk-handling facilities at Rotterdam and Amsterdam, and an efficient system of inland waterways and air services. The fast expanding port of Rotterdam (see Europort article on page 10), now comes second only to New York, with some 75 million tons of overseas freight discharged and loaded each year. The Dutch have also shown initiative in the provision of banking and insurance services. All this has led, in combination with other factors, to the Netherlands reputation as one of the great trading nations of the world. The tourist trade also brings in large amounts of foreign exchange and new Hilton hotels are being planned for both Amsterdam and Rotterdam to help accommodate the approximately 15 million foreign visitors each year.

The gross national product of the Netherlands in 1958, at market prices, reached fl.35.9 billion, up from fl.35 billion in 1957; the improvement reflects the business recovery from the mild recession in the latter part of 1957. Estimates made some years ago show the contributions made by various sectors of the economy roughly as follows: agriculture and fisheries, 12 per cent, industry and construction 45 per cent, commerce and transport 20 per cent, public services 10 per cent, and miscellaneous activities 13 per cent. The 1959 budget showed a surplus of fl.1.5 billion, compared with a deficit of fl.0.5 billion in the previous year.

The net national income at market prices last year totalled fl.32.7 billion, or roughly fl.3,000 per capita, up from fl.2,250 only five years ago. Although this indicates industrial progress accompanied by a steady rise in living standards, the Dutch consumer, because of this income level, has to exercise restraint in his buying and tends to be price-conscious. The average Dutch family is said to spend about 40 per cent of its income on food and drink; 30 per cent on consumer durables; 15 per cent on rent, fuel and domestic utilities, and the remainder (15 per cent) goes for miscellaneous expenditures.

Balance of Payments

The Netherlands balance of payments last year showed a surplus of fl.1,903 million on current and capital account combined. This was made up of a surplus of fl.1,694 million on current account and fl.209 million on capital account. In 1957, the current account had a deficit of fl.419 million and the capital account a surplus of fl.545 million, for a total surplus of fl.126 million. The larger surplus in 1958 made possible the full redemption of the short-term loan of fl.261 million from the International Monetary Fund and added fl.1.6 billion to the gold and foreign exchange holdings which, at the beginning of 1959, stood at fl.5,469 million.

Foreign Trade

The Netherlands must rely on imports to a large degree to meet domestic needs for goods that it cannot produce itself. These must be paid for mainly by selling products abroad. Because the country has few natural resources, it brings in raw materials for agriculture and industry and re-exports them in the form of finished or converted products. For this reason, foreign trade has become more important to the Netherlands than to almost any other country; the combined value of exports and imports totals not much less than the national income. The table of imports and exports by product category, on page six, shows the composition of Dutch trade from 1956 through 1958.

The Netherlands chief trading partners, both for imports and exports, are in Western Europe, although overseas countries provide a relatively important source

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IMPORTS AND EXPORTS BY PRODUCTS

Product Category	Imports			Exports		
	1956	1957	1958	1956	1957	1958
	(fl. million)					
Foodstuffs, beverages and tobacco	2,082	2,209	2,123	3,353	3,354	3,395
Raw materials (non-edible)	2,235	2,332	1,867	793	816	774
Mineral fuels, lubricants, etc.	2,125	2,630	2,337	1,328	1,684	1,607
Animal and vegetable oils and fats	215	238	218	193	168	161
Machinery and transport material	2,642	3,003	2,677	1,598	1,745	2,041
Non-precious metals and metal goods	1,744	1,850	1,457	866	982	1,056
Textile goods, including clothing	984	1,065	886	915	995	1,036
Chemical products	652	754	760	755	949	1,036
Industrial products	1,271	1,359	1,310	979	970	1,019
Other products	155	157	139	95	107	101
TOTAL	14,105	15,597	13,774	10,875	11,770	12,226

DISTRIBUTION OF FOREIGN TRADE

(by origin and destination)

	Per cent of total imports			Per cent of total exports		
	1956	1957	1958	1956	1957	1958
Europe	61	60	62	70	72	73
Belgium-Luxembourg	19	18	19	14	16	15
West Germany	18	19	19	18	19	20
United Kingdom	8	8	7	12	11	11
France	3	3	3	6	5	5
Sweden	3	3	3	5	5	5
America	23	24	19	13	12	13
United States	13	13	12	6	5	6
Asia	11	12	14	10	9	6
Indonesia	3	3	2	3	2	1
Africa	4	4	4	6	6	6
Australia	1		1	1	1	2

of raw materials. It is interesting to review this situation as reflected from 1956 through 1958 in the table above. It reveals an increased reliance on trade with European countries relative to the United States and other parts of North and South America.

Transit Trade

Dutch trading firms have long handled transit trading transactions involving the purchase of foreign goods for shipment to third countries and the attendant transfer of foreign currencies. Although values are not known, it is estimated that this trade ran to 55 million tons gross weight in 1957 (see the article on "Netherlands Transit Trade" in the December 20, 1958, issue of *Foreign Trade*). It is carried on between practically all parts of the world, with the United States ranking in 1957 as the leading destination of goods passing through Holland in transit (24 per cent), and West Germany as the leading supplier (59 per cent). In addition to primary commodities such as grains, hides, fruit, pulp and paper, this trade also involves machinery and other manufactured goods, presenting a range of business possibilities for competitive Canadian exporters who are unable, perhaps for currency reasons, to sell in certain markets.

The businessman should note, however, that the introduction of external currency convertibility at the end of 1958 by the Netherlands, the United Kingdom and a number of other European countries has, from the exchange point of view, greatly increased opportunities for Canadian exporters to sell direct to foreign markets.

Trade with Canada

Netherlands imports from Canada, based largely on agricultural and industrial raw materials, have shown considerable growth in the past five years, accounting for a more or less uniform 1.5 per cent of total imports. Despite a reversal in this trend in 1958 because of smaller sales of flaxseed, pulpwood, raw asbestos and primary aluminum, most of the main items in our export trade with the Netherlands were purchased in substantially larger quantities. Dutch exports to Canada have made even larger gains in value in recent years, but still amount to somewhat less than half the value of their imports from Canada. The total values of this exchange of goods over the past five years are shown below:

NETHERLANDS TOTAL TRADE WITH CANADA

	Imports	Exports
	(fl. million)	
1954	149	57
1955	149	68
1956	181	78
1957	207	81
1958	196	96

(For further details on Netherlands imports from Canada, see report on the Netherlands in our June 20, 1959, issue.)

Composition of Exports

The main categories of Dutch exports to Canada, in order of importance, are machinery and apparatus, processed foods and beverages, flower bulbs and nursery stock, semi-fabricated metal products and textiles. These represented 48 per cent of imports in 1958 compared with 39 per cent the previous year. Exports to Canada have been stimulated largely by the increased sale of Dutch foodstuffs and flower bulbs in the Canadian market. (See article on the flower bulb industry on page 11.) An order for several bulk carriers for use in Canadian waters was recently awarded to a Dutch shipyard and a steady effort is being made to

expand further the Canadian market for Dutch industrial and manufactured goods.

Trade Policy

A nation whose livelihood depends on foreign trade, the Netherlands has for centuries advocated the widest and most unrestricted framework for the exchange of commodities. Its own import regulations are relatively liberal; most products are admitted from all sources free from quantitative restrictions. The Netherlands has formed an economic union, known as Benelux, with Belgium and Luxembourg and within this, no import duties are levied. Moreover, Holland is a member of the European Common Market and thus is party to the tariff reductions and some increases in import quotas initiated this year under the terms of the Rome Treaty. In concert with the other Common Market countries, the Benelux members have extended some of these tariff reductions to countries outside the EEC entitled to most-favoured-nation treatment, including Canada. How the Common Market arrangements will affect Canadian exports to the Netherlands cannot be altogether foreseen until the negotiation and implementation of common tariff rates against outside suppliers has reached a more advanced stage. However, there are signs that at least some of the major Canadian exports to this market, including certain manufactured products, may become more difficult to sell.

Doing Business in the Netherlands

The most common and effective types of representation that Canadian exporters to Holland employ are commission agents or import houses (which frequently deal on a commission basis as well as for their own account, particularly in the food trades). When, for competitive reasons, it is not possible to develop sales through an agent, business may sometimes be done directly with users or large distributors (see article "How the Retail Trade Buys" on page 15). Occasionally manufacturers will import allied products, such as school supplies, to round out their own lines. Given a reasonable market potential, it is usually not difficult to find capable representation and the market can normally be covered adequately by one agent or importer.

The metric system of weights and measures is used in the Netherlands. Quotations should be made, if possible, c.i.f. Dutch port or at least f.o.b. Canadian port of shipment, and expressed preferably in U.S. dollars or Dutch florins, to allow for ready comparison. This is a price market and offers must be highly competitive if business is to result. Most Dutch importers can meet letter-of-credit terms if necessary, but cash against documents and in some cases 30 or 60-day term credits are more common. The Netherlands is not experiencing any foreign exchange difficulties and long-term credits are seldom needed.

Once serious interest in a product has been established, it is customary to provide samples or descriptive literature to permit a proper assessment of the market. Samples of no commercial value are not subject to customs duty and others may be imported free of duty by means of a temporary or transit permit. Intensive advertising is rarely used in promotion, except for branded articles for which the market potential is sufficient to warrant the considerable expense. Normal export packing is usually adequate, in view of the reliable and direct shipping and air transport facilities between Canada and the Netherlands.

Prospective Canadian exporters will usually find their correspondence treated promptly, courteously and intelligently by Dutch importers. They should make a point of responding in kind if they wish to maintain interest in their offers. Although the standards of business reliability are high, mercantile reports are easily obtained if these are deemed advisable in initiating a business relationship. ●

Canada's sales to the Netherlands include substantial quantities of raw materials for industry. Here two dock workers unload incoming supplies of Canadian pulpwood at a Dutch port.

Over half the farmers in Holland concentrate on dairying and the black and white Friesian cattle grazing in the level fields divided by canals are a familiar sight. The Netherlands sells more condensed milk abroad than any other country; ranks second as a cheese exporter.

Farm Products: a Two-Way Trade

F. ABELL,
Office of the Commercial Secretary, The Hague.

AGRICULTURE has long been one of the principal means of livelihood in the Netherlands, and although postwar conditions have brought unparallelled industrial growth, farming still makes an important contribution to the national income. A favourable climate and geographical conditions have helped Dutch agriculture to reach its present eminence; in the Netherlands the mainly westerly winds bring moist, mild air from the sea. Average annual rainfall totals 21.9 inches and is fairly evenly distributed throughout the seasons.

Dutch soils vary widely but they are generally fertile and benefit from an efficient water supply. Along the west coast behind the dunes stretches a strip of light sandy soil, some of which is ideal for growing tulip bulbs. Farther inland, this strip gives way to a fen peat region intruded by occasional old sea-clay deposits. The eastern and southern parts of the country consist largely of sandy soils with diluvial clay deposits along the large rivers; in the southwest, the north and the Zuiderzee polders, younger marine-clay soils prevail.

Land Use

The greater part of the land used for agriculture is taken up by farms ranging in size from 10 to 40 acres. In fact, more than 50 per cent of the 314 thousand farms consist of less than 12 acres, and only 150 contain more than 250 acres. Mixed farming is generally practised and about 90 per cent of all Dutch farmers grow field crops as well as raise livestock. Pure livestock farms are found only in Friesland and the eastern provinces.

Labour and Mechanization

Since the end of World War II farm mechanization has developed rapidly in the Netherlands, reducing farm employment. In addition, an extensive program of reallocating farm land is creating more economic farm units and thus making possible more mechanization and cutting farm labour needs. As a result, today only about 500 thousand persons—less than 12 per cent of the working population—are employed in agriculture, compared with 44 per cent in the middle of the 19th century, 20 per cent in 1947, and 16 per cent in 1956.

Probably the best indication of Dutch farm mechanization is the figures on tractors. Tractors used for agricultural purposes rose from 5,700 in 1940 to 24,500 in 1950 and to 66,000 in 1958. Some 85 per cent of the tractor fleet is owned by independent farmers, 10 per cent by tractor rental agencies, and 5 per cent by co-operatives. The use of other farm machinery has also increased—milking machines from 9,000 in 1950 to 23,000 in 1958, and combines more than doubled to 2,700 in the same period. In addition, most farms are well equipped with ploughs, harrows, cultivators, mowers and other agricultural implements.

Fertilizers and Water Control

Intensive farming demands good fertilization to maintain soil structure. Per acre consumption of fertilizers in Holland is the third highest in the world.

Nitrogenous and phosphate fertilizers are produced domestically in more than adequate degree but potassium fertilizers must be imported. They come chiefly from West Germany, Belgium-Luxembourg and France, and in the 1957-58 season totalled 165,300 metric tons.

Water is both the eternal foe and the indispensable ally of the Dutch farmer. But for man's intervention, one-half of the Netherlands would be permanently or periodically inundated. Solid dykes along the coast and the large rivers protect the low-lying land which is divided into polders surrounded by further dykes.

Electric and diesel pumping stations remove the excess water from the polders into the rivers and canals that carry it off to the sea. Thus the polders are protected from flooding during periods of heavy rainfall, and in dry seasons water is available for irrigation. This water-control system also makes it possible to adjust the ground-water level in the polders to the requirements of individual crops. Thus in a polder sown to field crops the water table is generally kept low but in one used as pasture it is kept high.

Dairying Important

Dairying occupies a prominent role in Dutch agriculture, employing over 50 per cent of the farmland and well over half the people engaged in farming. The production of fluid milk in 1958 reached some six million metric tons (13.2 billion lb.), of which more than 85 per cent went into butter, cheese, condensed milk, milk powder and other dairy products. Well known in foreign markets, these products give Holland the distinction of ranking first as a world exporter of condensed milk, second in cheese, third in powdered milk and fourth in butter. The principal markets for these products lie in Western Europe, Asia, Africa and South America.

In times of surplus, stocks of processed dairy products (such as butter, cheese and dry skimmed milk) may be taken off the market at a fixed price and held by the Dairy Purchase and Sales Office for subsequent release to the domestic and export trade. In recent years these operations have resulted in considerable losses, paid out of public funds. Because of improved markets, the stocks of butter, cheese and powdered milk held by this office are now much lower than in previous years. Skimmed milk powder, for example, is being offered to the trade at the original purchase price of fl.92.00 per 100 kilos (approximately ten cents a pound).

Although it benefits the dairy industry, this price level works a hardship on calf feeders who depend on competitively priced feed supplies to meet competition in their export markets for slaughter calves. In recognition of this problem, the Government has permitted the import of cheaper skimmed milk powder from Canada and other sources for use as animal feed, provided that the importer contracts to buy an equivalent quantity from government stocks at the original purchase price. This has resulted in the sale of several thousand tons of Canadian dry skimmed milk in recent weeks, relieving our own surplus position as well as answering the needs of the Dutch cattle feeders.

NETHERLANDS IMPORTS OF CANADIAN AGRICULTURAL AND FOOD PRODUCTS

	1958	1957
	(fl.'000)	
Fruits, vegetables and preparations	1,893	648
Meat and meat preparations	247	324
Dairy products, eggs and honey	68	291
Cereals and preparations	102,767	84,790
Sugar and sugar products	4	64
Cocoa and spice preparations	105	26
Animal feeds, excluding raw cereals	275	538
Mixed food preparations	2	20
Beverages	43	58
Tobacco and manufactures	945	901
Hides and skins	1,438	1,285
Oilseeds and nuts	32,531	57,668
Horticultural and floricultural products	65	144
Animal and vegetable oils and fats	489	634
Fish and fish products	2,553	1,235
Total agricultural and food products	143,502	148,626
Total commodity trade	197,000	207,000
Agricultural and food products as per cent of total	73%	70%

Other Production and Trade

The foregoing brief sketch of agricultural conditions in the Netherlands only hints at the intensive character of Dutch agriculture. In horticulture and dairying, Holland is one of the world's leaders. Dutch seed potatoes and bulbs go out to all parts of the globe, and in recent years Holland has become the world's leading exporter of eggs. None the less, the Netherlands is also a large importer of agricultural products; in 1958 these accounted for 20 per cent of all imports. Canada's share in this trade totalled fl.144 million, down slightly from 1957, and represented 73 per cent of total Canadian exports to Holland.

Imports from Canada

Wheat worth fl.94 million* represented 66 per cent by value of Canadian exports of agricultural and food products to the Netherlands in 1958. Dutch imports of Canadian wheat increased by fl.10 million in 1958, making Canada the Netherlands number one supplier. However, in the latter part of 1958 the U.S.S.R. entered the Dutch market and purchases of Russian wheat have since increased markedly, to the detriment of Canadian sales. On a crop-year basis Dutch imports of Canadian wheat in 1957-58 totalled 462 thousand metric tons, but at the end of April 1959 they had reached 135

*This section is based entirely on official Netherlands statistics.

thousand metric tons compared with 171 thousand at the same time one year earlier.

Next to cereals, oilseeds generally are the most important group of Canadian agricultural exports to the Netherlands. Despite a decline in value from fl.57.7 million in 1957 to fl.37.5 million in 1958, they accounted for nearly 23 per cent of Dutch imports of Canadian agricultural food products. This decline primarily resulted from smaller imports of flaxseed, which fell from 109 thousand metric tons in 1957 to a mere 51,000 metric tons in 1958. On the other hand, imports of rapeseed increased considerably—from 1,500 metric tons in 1957 to over 15,000 tons last year—placing Canada first among rapeseed suppliers to the Netherlands. In addition, Canada gained entry to the Dutch market for yellow mustardseed (brown mustardseed was imported in the previous year). These gains could not, however, make up for the sharp decline in flaxseed shipments.

As contrasted with the general trend in previous years, Canadian exports of feed grains to the Netherlands, with the exception of oats, went up substantially in 1958. The import value of Canadian rye, for example, was up more than 500 per cent from the 1957 level. Canadian corn exports to this market, worth only fl.14,000 in 1957, were valued at no less than fl.1.9 million, and buckwheat shipments amounted to fl.1.3 million—nearly four times as much as in the previous year. The net result of both favourable and unfavourable developments was that the Netherlands in 1958 imported Canadian feed grains to a value of fl.8.7 million, compared with fl.4 million in 1956 and fl.1.4 million in 1957.

A surprising upward trend was noticed in Dutch imports of fruits and vegetables from Canada up to the end of the 1957 crop year: these rose from just over fl.200 thousand in 1956 to nearly fl.650 thousand in 1957 and to fl1.9 million last year. Shipments of fresh apples were largely responsible for this gain and amounted to nearly fl1.4 million in 1958 as against less than fl.400 thousand in 1957. Other commodities contributing to the increase were fruit preserves in brine, fruit pulp and fruit juice. The heavy shipments of fresh Canadian apples in the 1957-58 season were made possible by the poor 1957 Dutch crop. However, as 1958 yields were considerably better, Canadian apple suppliers did not find themselves in the same favourable position this past season as they did in the previous year.

The Netherlands has at Amsterdam a busy stock exchange which last year traded shares worth fl. 545.2 million, as against a value of only fl. 416.5 million in 1957. Nominal value of all shares listed stood at fl. 5,231 million at the end of last year, compared with fl. 4,956 million at the end of 1957. About 235,313 U.S. share certificates were traded last year.

Holland's Europort Takes Shape

AS the St. Lawrence serves the industrial heartland of North America, so the Rhine serves German heavy industry. Ocean and lake vessels, however, may traverse the St. Lawrence to reach the Great Lakes ports of Canada and the United States, but traffic up and down the Rhine is carried in some 200 thousand river barges. As European industry grows, Rotterdam, the most important of the Rhine ports, must grow apace. In anticipation of rapid expansion within the Common Market, the Rotterdam port authorities have embarked upon their most ambitious scheme yet—Europort.

Rotterdam's growth as a port dates from the completion of the 16-mile New Waterway in 1884 that bypassed the silted mouth of the Meuse. Last year 21,956 ocean vessels docked at Rotterdam's 13 miles of quays and its 13,000 dockers handled 74 million tons of cargo. This meant that the port retained its position as the second busiest in the world.

The Europort development, covering 4,000 acres on Rozenburg Island, will push the Rotterdam harbour area by way of the New Waterway almost to the North Sea. By the time the project is completed in 1965, it will have cost the city of Rotterdam more than $40 million. The first phase, to be ready in 1961, will permit entry to the main harbour of ships up to 65,000 tons, drawing 43 feet; the second phase will provide direct access to the sea for vessels up to 100 thousand tons with a draught of 47 feet.

Allied with the widening and deepening of the waterways is the construction of facilities for the repair of ships and the handling of bulk cargoes such as oil and coal. A new 110 thousand-ton drydock was recently completed in the main yard of the Verolme United Shipyards and two more are to be completed in 1960—one of 85,000 tons and one of 35,000.

But industrialization on the Europort site is as much a part of the plan as extension of port facilities. Work is progressing on an oil pipeline from Europort to Godorf near Cologne in West Germany. This line, to be ready in 1960, will have an initial throughput of 6.3 million tons a year. A primary steel operation, to be the second biggest in Holland, is also planned. The Netherlands Steel Study Foundation is at present considering preliminary plans developed by Krupp of West Germany. The development includes a steelworks with an initial capacity of 300 thousand tons of crude steel a year, plus an adjoining rolling mill. The cost of this project has been estimated at about $100 million. It is reported that production could easily be stepped up to one million tons a year and that space is available for a possible extension to three or four million tons. There is room also for a coking plant, chemical works and cement factory.

—B. HORTH,
Assistant Commercial Secretary, The Hague.

The world's largest outdoor flower show at Lisse displays the products of the Dutch bulb industry in a woodland setting that highlights their springtime beauty. Last spring, over a million visitors from other countries came to see this show.

Bulb-Growers Sell Beauty

W. R. HICKMAN,
Commercial Secretary, The Hague.

LAST year Canadians spent nearly a million and a half dollars on flower bulbs from the Netherlands, buying beauty for their homes and gardens. They thus shared in one of the oldest and most lucrative branches of Dutch agriculture. Today tulips, daffodils, hyacinths, lilies, dahlias, and many other types of bulbs are grown on roughly 20,000 acres of the Dutch countryside.

Flower-bulb culture in the Netherlands began with the introduction centuries ago of wild-flowering tulips, daffodils and hyacinths native to the mountain slopes and steppes of Asia. Tulips, first brought to Holland in 1571, came into special prominence in the time of Madame de Pompadour, when single bulbs sometimes brought as much as $2,000. Trade grew steadily through the 19th century, though on a less extravagant scale, with the collection of many new species from abroad. Today the Dutch grow more than 8,000 hybrid varieties of flower bulbs and sell them in world markets, catering to a variety of climates and of buyers' tastes.

Production and Trade

Some 9,000 farmers now raise flower bulbs from roughly 20,000 acres under cultivation. The Government regulates the acreage according to supply and demand and sets minimum prices for domestic and export trade at a certain percentage of the cost of production. Surplus stocks are sold for fodder or destroyed. The cost of these operations is pro-rated among growers according to the number of bulbs each produces.

After the last year of World War II, when thousands of tons of tulip and crocus bulbs were used for food, bulb exports recovered steadily to reach in 1957 a record of 64,000 tons, valued at over $50 million. This record was maintained in 1958 and clearly demonstrates the significant role of Dutch bulbs in providing foreign exchange for the purchase of imported raw and semi-manufactured materials for industry. In addition to becoming a leading export, many bulbs are sold locally for the large-scale commercial production of cut flowers, another notable export.

The bulb industry also helps in promoting tourist trade. This spring, as one example, over a million foreign visitors flocked to the tenth anniversary of the "Keukenhof" at Lisse, the world's largest outdoor flower show. Here, in beautifully landscaped gardens and brilliant fields, some of the Netherlands leading growers are gaining worldwide fame for their country and its flower bulb industry. It is estimated that amateur and professional photographers shoot over 350 miles of film at the "Keukenhof" each season, and land values in this area for the production of certain types of bulbs run as high as $2,000 per acre.

Growers Well Organized

Successive generations of breeding skill, an ideal climate and soil, moisture control, and the techniques of modern science all help to explain the enviable posi-

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tion of the Dutch bulb industry. It owes much also to its administrative and technical organization. Growers and exporters each have their associations, responsible for price regulation, quality standards, scientific research and sales promotion, and for otherwise advancing the interests of their members. An officially recognized arbitration board has been set up to deal with commercial disputes of various kinds. To assure quality, the growers have founded a bulb research laboratory under the direction of Professor Dr. E. van Slogteren, whose pioneering work in plant research is widely recognized. All bulb diseases are now known and largely eliminated, and improved methods of early forcing, storage and transportation have been developed.

The Phytopathological Service inspects crops and bulbs to make sure they are healthy, and issues certificates. Bulbs destined for Canada or the United States are examined in Holland during the shipping season by inspectors assigned by agricultural authorities in those countries. This has worked to the mutual advantage of Dutch exporters and Canadian buyers in averting possible rejection of shipments and in maintaining high standards of quality.

Buying and Selling Methods

There are some 650 exporters of Dutch bulbs, most of whom own some acreage or contract with growers for part of their requirements; a minority operate purely as dealers. A substantial percentage of sales to foreign buyers is normally covered by purchase contracts for forward delivery. These are made throughout the year on the central bulb exchange or through commission operators, and may be effected in the spring at so-called "green" auctions in the field. In this way the buyer gets some protection against crop and price fluctuations that could otherwise prove ruinous. Exporters whose requirements are not fully covered in one or other of these ways can make spot purchases during the shipping season on the bulb exchange or at co-operative grower auctions.

In the first few months of every year, several hundred salesmen from various exporting firms call on buyers in the United States and Canada, taking orders direct from florists, seed stores, chain and department stores. The shipping season runs through the spring months for summer or fall-flowering bulbs such as lilies, dahlias and gladioli, and from mid-August to early October for the spring-flowering bulbs such as daffodils, hyacinths and tulips. Selling methods have improved greatly; the Government Bulb College at Lisse offers extensive training courses to young growers and salesmen alike.

Co-operative sales promotion financed by export levies is undertaken by the Central Bulb Propaganda Committee and includes paid advertising, promotion films, and the tour of the Dutch Tulip Queen in Canada and the United States last fall. It was in this becoming role that Miss Leni Quant was aptly quoted at a reception given to welcome her in Ottawa by the Netherlands Ambassador, His Excellency D. J. von Balluseck, as saying that it was not her purpose to make Canadians buy more Dutch bulbs, but simply to remind them that now was the time to plant them!

Canada a Growing Market

Sales of Dutch flower bulbs to Canada have risen from 1,500 metric tons valued at $850 thousand in 1950 to 2,000 metric tons valued at $1.4 million in 1958, placing us among the highest per capita importers. This growth has resulted partly from the increase in the Canadian population and in living standards over the past decade, but it owes much also to new production and merchandising techniques. Until five or six years ago, for example, most bulbs imported into Canada were used for forcing, with the production of cut flowers as the objective. This is no longer true with the large-scale import of cut flowers by air from the South. To hold their position on the market, Dutch bulb exporters have had to introduce varieties that mature earlier and last longer. Educational advertising has also done much to develop the Canadian market and has meant increased sales through seed stores and nursery gardens. In addition, the introduction of attractively prepackaged bulbs with descriptive literature for counter sales in department and chain stores has proved an effective means of selling in Canada.

To the Canadian people any story on the Dutch bulb industry would not be complete without mentioning the beauty of Ottawa's parkways during tulip time. Each year Her Majesty Queen Juliana of the Netherlands sends a gift of flower bulbs to Ottawa as an affectionate reminder of the close ties between the two countries. The tulips are also a colourful expression of Canada's appreciation of this justly famous Netherlands product.

Foundation Promotes Trade

One of the agencies actively furthering Dutch commerce with foreign countries is the foundation known as the Netherlands Institute for the Promotion of Foreign Trade. Set up in 1946, it has become a central organization for the collection, collation, and dissemination of commercial information useful to the Dutch exporter. It also carries on market research for small and medium-sized businesses. It has evolved a technique of sending out about a dozen experienced "explorers". These examine foreign markets at first hand and also carry out various commissions, such as appointing agents and checking on the current representatives of Dutch firms. The Institute also arranges collective Netherlands exhibits at trade fairs abroad.

The "Sept Iles", an ore carrier, discharges iron ore mined in Labrador at the Botlek harbour area in Rotterdam. Back of the carrier Rhine barges are massed, ready to transport some of the ore up the river to hungry steel mills.

Wanted: Raw Materials

B. HORTH,
Assistant Commercial Secretary, The Hague.

THE stereotype of the Netherlands as a piece of flat green earth intersected by canals set behind a string of dykes, populated by windmills, black and white cows, and farmers tending their fields of tulips, never more than a partial truth, is now certainly false. Today the Netherlands is an industrial nation, producing trucks, automobiles, aircraft, locomotives, steel, plastics, ships, chemicals, textiles, and many other things. Industrial growth was well under way before World War II but in the postwar years the pace has quickened. Over-all industrial production in 1958 was more than double that of 1938, the last normal prewar year, and industrial productivity has risen 24 per cent in the same period.

Industrialization Necessary

Dutch industry began with the processing of imported raw materials in the 16th and 17th centuries, when Amsterdam was the leading commercial centre in Europe. It is still based largely on imported raw materials because, with the exception of coal, salt and recently discovered petroleum, the Netherlands has few of the raw materials that modern industry needs. The character and extent of Dutch imports of raw materials have, however, altered considerably.

A combination of circumstances provided the impetus for Holland's postwar industrial growth. The more important were the loss of her Indonesian possessions, the realization that the solution to her balance-of-payments problem lay partly in an increase in home-produced manufactured goods, and, above all else, the pressure of a rapidly increasing population. In the first half of this century the Netherlands population doubled and it has gone up 27 per cent since 1938 alone. Industralization is clearly a policy born of necessity.

Foreign Industry's Share

A large part of Holland's postwar industrial growth has been provided or assisted by foreign capital. Marshall Plan aid helped tremendously in the immediate postwar years, but has long been supplanted by a steadily broadening stream of private foreign capital. About 170 foreign firms have established subsidiaries in Holland since the end of World War II, more than half of them from the United States. In addition, 144 others have entered into some sort of co-operation with existing Dutch enterprises. More than a third of the foreign firms that have established themselves in Holland are in the metalworking field, followed by the chemical, foodstuffs and textile industries, in that order. It is worth noting that these four are also the leading export industries in the Netherlands—and in the same order of importance.

The Trend of Imports

This postwar industrialization has been accompanied by a steady growth in imports; in 1958 imports were up 94 per cent in volume over 1938 and they have increased 53 per cent in the last five years alone. Imports of machinery have shown the most spectacular

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DUTCH IMPORTS OF RAW MATERIALS

(in metric tons)

	1938	1952	1958
Oilseeds, nuts, etc.	730,228	277,333	658,974
of which copra	53,137	143,941	96,136
of which soybeans	110,002	53,376	212,012
Hides and skins	42,022	24,213	51,449
Raw rubber	5,234	13,028	15,498
Vegetable fats and oils	66,411	94,920	111,142
Cocoa beans	76,883	45,865	62,103
Salt	101,697	69,785	51,299
Sulphur	2,137	1,804	65,818
Iron ore	489,404	1,192,001	1,776,139
Coal and briquettes (excluding bunker coal)	5,234,819	5,532,005	7,275,192
Raw petroleum	433,478	6,820,378	14,061,948
Raw cotton	53,223	59,933	70,536
Copper	9,942	31,520	59,143
Nickel and scrap	1,365	10,125	1,590
Aluminum	1,460	9,845	19,881
Pulpwood (cubic metres)	687,068	368,996	262,794
Zinc ore	45,434	84,370	72,406
Tin ore	38,822	37,306	20,538
Pyrite (roasted and unroasted)	403,013	440,659	345,390

gain—up 120 per cent in volume and 13 times in value over the twenty years to the end of 1958. A group of less complicated manufactured goods—including metals and metal products, textiles, wood, paper, rubber and leather—increased 80 per cent in volume and eight times in value. Imports of raw materials—including hides, oilseeds, raw and synthetic rubber, wood and wood pulp, textile fibres and ores—have increased 60 per cent in volume and about 4½ times in value. This increase has been particularly marked in fuels and lubricants, with crude petroleum (up 2½ times) the controlling factor. Let us examine some of these raw material imports in more detail and see how they are providing for the needs of Dutch industry.

Petroleum—Petroleum imports rose from just over 400 thousand tons in 1938 to 14 million in 1958. Two refineries are in operation and a third is being built. Their combined capacity will total 24½ million tons a year by 1960. Domestic oil production, which started in 1944, reached 1.6 million tons in 1958. Associated industries are increasing in importance each year—Holland's first synthetic rubber plant was recently completed and a second is under construction. Synthetic detergents, plastic raw materials, glycerine and sulphur are also being turned out in increasing amounts.

Coal—Coal imports rose from five million tons in 1938 to seven million in 1958; about one-half of these imports currently come from the United States, followed by West Germany and Belgium. Domestic output totals about 12 million tons a year. Some five million tons of coke are produced and the Dutch steel industry uses more than half of it; the rest is exported. Coke oven gas provides an important ingredient for the manufacture of nitrogenous fertilizers. Holland sells about 840 thousand tons abroad each year.

Sulphur—Sulphur imports have jumped from 2,000 tons in 1938 to 65,000 tons in 1958; they come almost entirely from Mexico and the United States. The recent sharp rise in imports stems from the opening of a new sulphuric acid plant that uses sulphur rather than pyrite as a raw material. For this reason, imports of pyrite were down from 403 thousand tons in 1938 to 345 thousand in 1958; most of it came from Cyprus, Portugal and Italy.

Iron Ore—Iron ore imports rose from 483 thousand tons in 1938 to 1.8 million tons in 1958; the chief suppliers are Sweden, Sierra Leone, Liberia, Spain and Canada. Pig iron production has increased from 267 thousand tons in 1938 to over 900 thousand tons in 1958. By August of this year it will achieve a rate of 1.2 million tons a year.

Crude steel production totalled 1.4 million tons in 1958, a 21 per cent rise over 1957. Plans to build a second blast furnace and primary steel operation in the new Europort area near Rotterdam are being studied.

Zinc and Tin—The base metal ores zinc and tin are smelted in Holland. Imports of zinc ore were more than 60 per cent higher in 1958 than before the war, with Canada the third largest supplier, behind Finland and Sweden. Imports of tin ore have declined, following the loss of Indonesian sources of supply.

Primary Base Metals—Among the primary base metals imported, aluminum has shown the greatest proportional increase—from 1,400 tons in 1938 to about 20,000 in 1958. Canada fell from first to third place as a supplier of primary aluminum, behind the U.S.S.R. and Austria. Copper was bought mainly from Belgium and the United States last year; imports reached 59,000 tons compared with only 9,000 in 1938. Zinc imports have almost doubled; Belgium, Norway, Poland and the Soviet Union were the main sources of this metal. Nickel purchases from abroad went up only slightly in 1958, although they have been rising in recent years.

Oilseeds, Nuts—Imports of both oilseeds and nuts in 1958 were smaller than twenty years earlier, but imports of vegetable oils and fats were about double. Holland has 18 margarine plants and 30 oil refineries turning out edible fats and oils and oil as a raw material for margarine. Soybeans (principally from the United States), palm kernels (mainly from Nigeria) and linseed (mainly from Canada and the U.S.) were the chief raw materials used by the Dutch crushing industry in 1958.

Hides and Skins—Imports of hides and skins increased from 42,000 tons in 1938 to 51,000 tons in 1958. Argentina, Belgium, West Germany and the United States were the main suppliers of cow-hides in 1958; calfskins came chiefly from Belgium, Australia, France and the United States. Nigeria and Argentina were the leading sources of horse-hides.

Pulpwood and Wood Pulp—Imports of pulpwood in 1958 were little more than one-third of those in 1938. Imports of wood pulp, however, have practically

trebled. There are more than 40 paper mills in Holland producing about 525 thousand tons of paper a year; about 150 thousand tons are exported. Sweden, Norway and Finland are the most important suppliers of wood pulp. In 1958 Canada ranked well behind Finland as the second largest supplier of pulpwood.

Rubber—Imports of natural rubber doubled between 1938 and 1958 to 15,000 tons; imports of synthetic rubber reached 4,590 tons in 1958 and most of it came from Canada and the United States. When a second synthetic rubber plant is completed in the near future, production capacity will total 55,000 tons a year.

These are but a few of the raw materials that Holland must import for her expanding industries. The pattern of these imports will undoubtedly continue to change. There is a distinct possibility that these purchases will go up even farther in the future, as Dutch industry is able to supply more and more of the consumer and capital goods that its people need. •

The new town centre in redesigned Rotterdam contains many of the department stores and fashion houses. The Wholesale Trade Building, also in this area, houses more than 200 importers/wholesalers, with space for offices, stores and showrooms.

How the Retail Trade Buys

N. RIEMEYER,
Office of the Commercial Secretary, The Hague.

THE visitor to a Netherlands town, large or small, is usually struck by the busy shopping streets with their modern, well-equipped stores. This is particularly true of cities where there was extensive postwar rebuilding —such as Rotterdam, Groningen and Nymegen—or cities that have grown rapidly, such as Amsterdam and The Hague. In these places the shopping centres, designed by modern architects, are most attractive.

Retail trade in the Netherlands is, generally speaking, a prosperous part of Dutch business life. But it is not easy to become a retailer and prospective shopkeepers must pass at least two examinations and also meet rather high financial requirements.

The large retailers may be divided into three categories: department stores, chain stores, and specialty stores. The large chain stores form a special class. Their combined turnover represents only 20 to 25 per cent of total retail sales. But, because of their research and specialized buying practices, they are often the first to realize new possibilities, either by introducing new products or by developing volume sales at reduced prices.

• Department Stores

The Netherlands has three large department-store organizations—N.V. Magazijn de Bijenkorf, with big establishments in Amsterdam, Rotterdam and The Hague; Vroom & Dreesman, a highly decentralized

undertaking with some 21 separate limited liability companies and operating 40 department stores in various parts of the country, and the Galeries Modernes, operating a large department store in Utrecht and smaller ones in Amsterdam, Rotterdam and Groningen.

Affiliated with Bijenkorf is N.V. Hema of Amsterdam, which operates small department stores in 23 towns. The assortment that the Hema stores offer is rather limited and includes chiefly low-priced items.

All of these department stores buy and import both directly and through local agents. The purchasing departments of the Bijenkorf in Amsterdam, Rotterdam and The Hague act independently, although in many instances purchases for the three stores are made in Amsterdam. The same is true of Vroom & Dreesman. The Galeries Modernes and N.V. Hema do their purchasing in Amsterdam.

• Chain Store Organizations

The largest chain-store organizations in the Netherlands are N.V.P. de Gruyter & Zoon, 's-Hertogenbosch, and N.V. Albert Heyn, Zaandam, both of which operate about 350 stores throughout the country. The third largest undertaking is N.V. Simon de Wit, Zaandam, which operates 150 stores. These were originally small grocery stores but in the course of the years they have increased their stock and now they sell practically all types of foodstuffs.

Although these chain-store organizations operate some self-service shops, there are no supermarkets of the North American type in Holland. The organizations listed above—particularly de Gruyter & Zoon and Heyn —also have large factories, where they make and pack many of the products that they sell.

In the field of specialty foodstuffs, there are also some large chain-store organizations, such as N.V. Hus, The Hague, and N.V. Lubro, Utrecht, which bake their own bread, biscuits and pastry. The shops of these two firms are all in The Hague and Utrecht.

In addition, manufacturers of confectionery and chocolate, such as N.V. C. Jamin, Rotterdam, and N.V. Bensdorp, Bussum, operate 300 and 100 shops, respectively. N.V. Ferwerda & Tieman of Haarlem operate 20 stores selling wines and spirits.

• Specialty Stores

The chain stores in the textile field are of another type. The number is considerably smaller but the individual stores are large. The leading organization in this field is N.V. Algemene Confectiehandel C. & A. Brenninkmeyer, Amsterdam, operating 20 shops and selling ladies' and children's ready-made clothing in the popular-priced range. In the larger cities this firm also operates shops that handle cheap men's clothing. On the other hand, de Bonneterie N.V., Amsterdam, with one branch in The Hague, sells high-priced goods exclusively.

In men's clothing, the principal chain-store organizations are N.V. Kreymborg, Amsterdam; Peek & Cloppenburg N.V., The Hague, and N.V. Verenigde Kledingmagazijnen, Amsterdam, operating 26, 12 and 9 shops respectively.

Chain-store organizations are also found in the shoe industry. Two large footwear manufacturers—N.V. Bata of Best and Ivo van Haren N.V. of Waalwijk—each operate about 80 retail stores. Hoogenbosch Schoenen N.V., Amsterdam, does not produce footwear but operates about 300 footwear shops.

This guide to chain-store companies in the Netherlands is not complete because it covers only the largest undertakings. The central organization for this group, the Board for Chain Store Companies, in Amsterdam, covers a total of about 175 firms.

• Co-operative Organizations

In addition to the private and limited liability companies, there are a number of co-operative retail organizations that restrict their activities primarily to the town in which they are established.

The Co-operatie Volharding, The Hague, operates 97 shops including 40 grocery, 28 bakery, 17 butcher, 2 greengrocers, 3 dry goods and 4 footwear stores. It also sells fuel, carries on a co-operative sickness insurance fund, and even acts as undertakers. The Co-operatie Vooruitgang, Rotterdam, operates 16 bakery, 47 grocery, 26 dairy and 26 butcher shops, as well as a number of cigar, footwear, dry goods, men's clothing, home furnishings and appliance shops.

Most co-operative retail organizations obtain their raw materials and branded articles from the Central Office of the Netherlands Co-operative Societies at Rotterdam. This organization makes, imports and handles many types of commodities and operates a large flour mill. In addition, there are many smaller co-operative purchasing societies in various parts of the country, who act on behalf of retailers.

For agricultural and horticultural raw materials, farm machinery, implements and fertilizers, there are two large co-operative purchasing and selling organizations in the Netherlands—the Central Bureau and the Co-operatie C.I.V., both of Rotterdam. These two are large importers and exporters of everything in the field of agriculture, horticulture and cattle-breeding.

Interested in Canadian Offers

We in this office have found that in most cases the large co-operative purchasing societies are interested in importing direct, and some trade in foodstuffs and agricultural raw materials from Canada has been carried on. The office of the Commercial Counsellor in The Hague welcomes inquiries from Canadian firms who wish further information on the possibility of doing business with any of the organizations mentioned in this article. •

This works harbour, just west of Hellevoetsluis, covers about 17 acres and handles the materials needed in building the dykes and locks specified in the Delta Plan. Some of these materials are transhipped into vessels that carry them to the precise point where they are needed.

Land from the Sea

B. HORTH,
Assistant Commercial Secretary, The Hague.

WHAT is the Delta Plan? It's an ambitious project for winning new land from the sea—some 30,000 to 37,000 acres—and creating freshwater reservoirs. It will take 20 to 25 years to complete, will shorten the coast of Holland by 250 miles, and will cost an estimated $540 million. Four tidal estuaries will be sealed off by dams with a collective length of 15 miles.

The new land, badly needed in this overcrowded country, will be only one of the benefits. The reservoirs will provide water for irrigation of soils in southwest Holland. They will also aid in keeping down floods by storing excess water discharged by rivers and polders at certain seasons. Improved communications will encourage the production of high-value crops for city markets, some industrial development, and the creation of a whole new recreation area.

The Delta Plan will mean losses to one group—the fishermen—because a valuable local fishery will probably be destroyed. At present 2,000 people in the area affected are engaged in fishing, 900 of whom breed oysters and mussels. Investment in oyster and mussel farms has been estimated at fl.25 million and in recent years exports of oysters have earned about fl.4 million a year.

How Project Began

Although the low-lying Rhine and Meuse estuaries have long been recognized as a weak link in Holland's battlements against the North Sea, it took a disaster to make the problem urgent—the catastrophic floods of February 1953. These inundated 425 thousand acres in southwest Holland, claimed 1,800 lives, and forced 72,000 persons to leave their homes.

The Delta Plan could never have been contemplated were it not for the experience gained by Dutch engineers down through the centuries. Each new generation has learned something from its predecessors and learned too how to avoid many of the errors made in earlier reclamation schemes. The disappearing windmill, a major innovation in the 16th century, for example, made feasible projects that were only dreams up to that time.

Probably the first Dutch land reclamation works were the mounds or turps, ranging from 5 to 40 acres in size, still seen in the northern part of the country. It is believed that the first dykes were built more than 1,100 years ago, once the early turp dwellers had established communications and social relations with one another. Today about one-quarter of Holland, containing six million people, lies below sea level.

The Zuider Zee Plan

The Zuider Zee Plan, Holland's greatest reclamation project, will not be completed until 1980. It will increase Dutch territory by 7 per cent and arable land by 9 per cent. This huge undertaking marks the final shift of Dutch reclamation work from private to public enterprise, principally because of the enormous costs. In former times, an entrepreneur would sell or lease new polder land as soon as it had been drained and, as a result, the first settler suffered great hardship. As

the Dutch saying goes, "One wins the land for the third hand". With the Zuider Zee polders—there are to be five in all, totalling 541 thousand acres—new land is not turned over to the tenant farmers until the soil is ready for cultivation, canals and highways finished, and farmhouses built, complete with running water and electricity.

In the first of these new polders, the Wieringer Meer, the State has retained 37 farms out of a total of 500. These are administered separately and exact accounts of their operations kept. These are useful in determining suitable rents. The second or North East Polder was closed off in 1939, pumped out by 1942, and the first farms leased in 1949. It has an area of 118,500 acres and 1,600 farms ranging from 30 to 120 acres. From 1949 on, an average of 150 farms have been leased each year. Needless to say, there have been far more applicants than farms available. By 1958 there were already 26,000 people living in this new area. Work on the third polder, East Flevoland, was begun in 1950 and is now well advanced. Dyking has started on the fourth polder, to be known as Markerwaard.

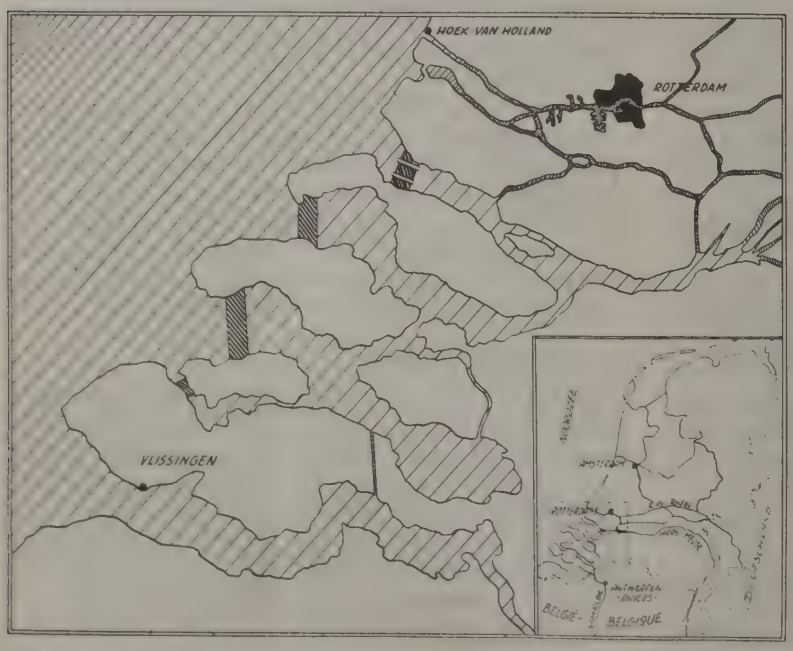
Engineering Skills for Export

The Zuider Zee works have demonstrated once again the exceptional ability of the Dutch people in all aspects of land reclamation and town planning. They have also built up a body of experience now being used in reclamation projects all over the world, sponsored both by private enterprise and by humanitarian organizations. However, the export of Dutch engineering services is no new thing. In the year 1103 Dutchmen are said to have crossed the frontier to help the Germans with land reclamation work around Bremen. Later generations undertook projects in France, Italy, Britain, Denmark, Sweden, Germany and Russia. Apart from dyke building and land reclamation, Dutch engineers have carried out dredging operations and harbour and canal works in many parts of the world. The following are some of the major projects undertaken in the postwar years:

- Drainage and reclamation of 175 thousand acres in the El Ghab Valley, Syria.
- An experimental polder of 125 thousand acres in the Kafue flats, Rhodesia.
- Reclamation of 10,000 acres in the region of the Mesolongion lagoons, Greece.
- Impoldering, draining and irrigation of 625 thousand acres in the Ganges Delta, East Pakistan.

In Canada, Dutch engineering skills have played an important part in such schemes as the Pitt polder project in British Columbia and the Holland Marsh area, north of Toronto.

Thus the Delta Plan, although it is an enormous project in itself, is but a logical development in Dutch reclamation work made possible by increasing knowledge and increasing need. Ironically, the surface of Holland is gradually sinking as the level of the surrounding ocean gradually rises. This does not appear to dismay the Dutch and they are already formulating plans to recover the area known as the Waddenzee, lying between the Frisian Islands and Holland's northern coast. When this project is completed, land reclamation in Holland will have gone about as far as it can go. •



The map shows the various places where great dykes will be built, sealing off four tidal estuaries. These dykes, taken together, are 15 miles long; will not be completed until 1980. The smaller map (inset) shows the relationship of the area that the plan covers to the rest of Holland.

Will Dutch Use Nuclear Power?

3. HORTH,
Assistant Commercial Secretary, The Hague.

GROWING power needs in the Netherlands are outpacing domestic fuel production despite the discovery of oil after the war. In 1937 domestic fuel output met 93 per cent of total Dutch energy demands but by 1975 the comparable figure will be only 33 per cent, according to a recent official forecast. Under these circumstances, the development of a nuclear power program seems to be the best alternative. Although no decisions have been made about power reactors, a number of Netherlands power companies are studying the pro's and con's of the types of reactors available. Dutch authorities hope that the first 150 megawatts of nuclear-produced power will be available in 1962 or 1963 and that this will increase to 3,000 mw. by 1975.

Several research reactors are already in operation or under construction in the Netherlands, but it is not likely that the first power reactors installed in this country will be of Dutch design. It is probable, rather, that they will be purchased complete from abroad or that they will be foreign reactors made in Holland under licence, with a large percentage of Dutch components. It is worth noting that 70 per cent of the components for the research reactor at Petten, now nearly completed, are being supplied by Dutch industry.

Research Is Co-ordinated

The organization co-ordinating nuclear development in the Netherlands is Reactor Centrum Nederland, a foundation representing government, industry, electricity supply companies and research groups. The current research and development activities of this foundation include the following:

• *A technical centre* under construction at Petten, where, in addition to the 20 mw. high-flux reactor (a 90 per cent enriched uranium pool type) there will be large chemical, physical and metallurgical laboratories.

• *An evaluation and design centre* in The Hague. A 100 kw. swimming-pool-type research reactor, developed here, is to be constructed at Wageningen for agricultural research.

• *A suspension reactor project,* in co-operation with the Company for the Testing of Electro-technical Materials (KEMA). A sub-critical assembly has been completed and a 250 kw. reactor is under construction.

• *An ultra-centrifuge project* in co-operation with industry and the Foundation for Fundamental Research on Matter (F.O.M.) for the separation of isotopes U-235 and U-238.

• *A documentation centre* for atomic energy which has been founded in co-operation with the Netherlands Institute for Documentation and Registration.

• *A joint establishment for nuclear research,* in co-operation with the Norwegian Atomic Energy Institute (I.F.A.), with a 450 kw. heavy-water natural uranium reactor. The two countries have also operated a joint reactor school at Kjeller, Norway, since April 1958.

Application of Atomic Energy

Apart from Reactor Centrum Nederland, a number of other organizations have been formed to promote the application of atomic energy in particular fields. These include:

• The Foundation for the Nuclear Propulsion of Merchant Ships (S.K.K.). This group has announced plans to install a power reactor in a 16,000-ton tanker to be used as a research vessel.

• Scheepsbouwbelangen N.V., a group of Dutch shipyards that have joined forces to study the nuclear propulsion of ships.

• Neratom, a joint enterprise formed by a number of leading industrial firms to promote the interests of Dutch industry in the construction of nuclear power stations. Members are: the Breda Engineering Works, Philips, the Rotterdam Dry Dock Company, Stork Royal Engine Works, Werkspoor Engineering Works, and the Schelde Shipyards. The latter firm is already working closely with Combustion Engineering Inc., New York.

Canadians as Suppliers

Although the decision on the Netherlands' first power reactor has still to be taken, it is probable that the first installation will be made at Geertruidenberg in North Brabant by ten co-operating electricity companies. The Dutch are aware that Canada is one of the world leaders in the atomic energy field. None the less, Canadian nuclear firms that wish to gain a foothold here would be well advised to establish contact with Reactor Centrum Nederland, 112 Scheveningseweg, The Hague. •

United States Invests in the Common Market

As the Common Market takes shape, many U.S. firms are setting up branch operations or entering into licensing arrangements in the six countries. Many others are considering this move.

L. H. AUSMAN, *Commercial Counsellor, Brussels.*

THE first steps have been taken towards the implementation of the European Economic Community. The six countries of the Common Market (France, Germany, Italy, Belgium, Netherlands and Luxembourg) are now involved in a lengthy process whereby tariffs and quotas between them will ultimately be eliminated and a common external tariff set up, applicable to the products of non-member countries.

What effect is this expected to have on industry within and outside the EEC? If the earlier Benelux Customs Union is taken as a guide, there will certainly be some reorganization of industry within the six countries, and no doubt a jockeying for position that will affect not only marginal producers but large and well-established firms as well. Already there have been several cases of large industrial companies in one Common Market country considering expansion in another. With the economic integration of a large part of Western Europe, with its population of over 165 million, conditions for the establishment of several manufacturing units throughout the territory closely resemble those in Canada and the United States.

U.S. Firms Interested

The number of European firms considering investment in neighbouring countries is, however, small in relation to the interest of United States firms in this area. For many years, but particularly since the end of the war, American manufacturers have made considerable efforts to establish their products throughout Europe. From the making of initial export sales through agents and distributors, the activities of some of these firms have developed to include the establishment of their own sales offices, service facilities and, finally, assembly and complete manufacture by wholly-owned subsidiaries. Others have purchased controlling or minority interests in existing European companies or have made arrangements of one kind or another for the manufacture of their products in Europe under licence.

The total of American direct investment abroad today substantially exceeds the value of foreign securities held privately in the United States and sales of foreign branches of American firms are 50 per cent greater

Before Investing . . .

U.S. firms who are considering establishing branch plants in a Western European country usually weigh these factors carefully.

- *Population and market possibilities.*
- *Accessibility, transportation and port facilities.*
- *Availability and price of raw materials.*
- *Quality of domestic components.*
- *Volume, skill and turnover of labour.*
- *Productivity and comparative wage rates.*
- *Incidence of strikes and absenteeism.*
- *Modernity of manufacturing methods.*
- *Research facilities.*
- *Taxation, both corporate and personal.*
- *Double taxation agreements.*
- *Amortization regulations.*
- *Trade agreements with other countries.*
- *Stability of currency and repatriation of profits and investments.*
- *Manufacturing sites available.*
- *Government and municipal assistance for new industries.*
- *Tradition of free enterprise.*

than United States direct exports. According to a recent study, of 100 of the most important U.S. companies 99 are engaged in manufacture abroad in one form or another.

The United States Department of Commerce reports that at the end of 1957 private investment abroad (direct and portfolio) totalled $36.8 billion, of which $12.8 billion was invested in Canada, $11.0 billion in Latin America, and $6.8 billion in Western Europe (to which should be added nearly $1 billion in European overseas territories). Europe thus accounted for about 21 per cent of American investments abroad.

Where Investment Made

Although official figures so far available do not show a much larger flow of United States capital to Europe in anticipation of European integration, this will probably develop as the Common Market moves towards more complete integration. It is nevertheless interesting to note the extent to which Common Market countries already have attracted investment and which sectors of industry are concerned. The table below gives the accumulated direct investments of American firms in 1950 and at the end of 1957.

	Investment by Country			Investment by Sector	
	1950	1957		1950	1957
			(in millions of dollars)		
Germany	204	496	Manufacturing	313	817
France	217	457	Oil	210	568
Italy	63	233	Commerce	49	126
Netherlands	84	213	Miscellaneous	61	135
Belgium Luxembourg	65	156			
Total:	633	1,555			

The lengthy time-table for complete integration of the Community is another relevant factor because a breakdown in the program could have an unfavourable influence on a marginal investment. Much will also depend on the outcome of the GATT tariff negotiations which will probably take place next year when the six EEC countries will have to submit their proposed common tariff to detailed scrutiny and negotiation.

The very existence of the Common Market creates a degree of tariff discrimination in favour of the Six and American businessmen realize that they must decide whether investment in Europe is the best or only alternative to a gradual reduction in exports to that area as a result of increased industrial development within the Community.

Investment in Belgium

It will be noted that, in comparison with other countries in the Common Market area, Belgium and Luxembourg have attracted only a modest amount of United States capital. Nevertheless, the number of American enterprises with Belgian affiliations is fairly substantial. Some of these were established before the war but the majority are of more recent origin. The present position is approximately* as follows:

Firms with manufacturing agreements with Belgian firms	105
Subsidiaries or branch plants or offices	152
Joint Belgian-American ownership	18
	275

*The validity of such a breakdown depends, of course, on the source of the lists of firms, the nature of their overseas investments, and the time factor. Lists compiled by various authorities seldom agree in detail.

Of the 152 subsidiaries, 41 are listed as manufacturing establishments.

In 1954 the Belgian Government set up an Industrial Information Service at the Belgian Consulate General in New York. This office provides technical information and advice to industrialists interested in establishing in the Common Market area in general and in Belgium in particular. Belgian banks, through their offices in New York, and at least one U.S. bank operating in Brussels, provide similar services. Since the opening of the Industrial Information Service 80 United States firms are reported to have started new operations in Belgium, involving an investment of nearly $200 million. In addition, many firms previously established have expanded their operations, diversified production, built additional plants, or reached new distribution and marketing agreements of one sort or another.

There are not more than a dozen Canadian firms with connections (other than sales or agency arrangements) in Belgium. Of these only two or three are manufacturing subsidiaries. Canadian investment would be welcome and attractive facilities are offered. Although the Belgian Industrial Information Service has not approached Canadian firms, it stands ready to be of assistance, as do Belgian Consular offices in Canada.

Versatile Plastic Boot

Employees in hospitals throughout Australia are wearing a new type of white plastic boot in operating theatres; it is the latest in a range of plastic boots made by an Australian firm. The firm also makes plastic gumboots and plastic industrial safety boots fitted with steel toes and fibre or steel insoles. These are used in meatworks and are expected to be used also in mines and in the fishing industry. The managing director of the company believes there are tremendous possibilities for plastic boots because of the way they resist oil, acid and water.

Commodity Notes

Ball Bearings

AUSTRALIA—The general manager of Pollard Ball and Roller Bearing Company Ltd., Yorkshire, England, is inspecting a number of sites in Victoria with a view to establishing an extensive ball and roller bearing manufacturing industry in Victoria. The proposed plant will be about six times as large as the Commonwealth ball-bearing factory at Echuca, Victoria, Australia's only such plant at present. It is anticipated the new factory will employ about 1,250 people within five years. There is a big market for bearings in Australia, where the bulk of bearings are imported—Melbourne.

Brake Linings

COLOMBIA—A new factory to make brake linings has been opened in Medellín by Fabrica de Repuestos Colombianos, Recos, with capital estimated at Can.-$300 thousand. This is the first factory of its type in Colombia. The firm, whose products will be marked *Reco,* is receiving technical assistance from the U.S. firm Raybestos. It is hoped that the opening of the factory will save about US$600 thousand on imports each year—Bogotá.

Chemicals

ARGENTINA—Industrias Plasticas Argentinas Koppers S.A. recently set up a plant to make polystyrene. The company proposes to establish more plants to produce ethylene, polyethylene and styrene monomer. The styrene monomer is to be used as a prime material in making synthetic rubber, and a plant has been planned for this. The cost of new factories is expected to total US$27 million, and will be financed by a loan from the Export-Import Bank—Buenos Aires.

Chipboard

AUSTRALIA—A new £750 thousand company, Particle Board Co. of Australia Pty. Ltd., was registered on June 23 at Mount Gambier, South Australia, to make wood chipboard. It will use radiata pine thinnings supplied by the South Australian Woods and Forests Department from Mount Gambier forests. Part of the capital will be supplied by overseas interests, and arrangements have been made to import modern plant and technicians—Melbourne.

Cobalt Beam Therapy Unit

BRAZIL—The Ministry of War has been authorized to buy a $33,000 "Theratron Junior" unit from Atomic Energy of Canada Limited. It is to be installed in the Central Army Hospital, Rio de Janeiro, for use in the treatment of cancer. This will be the third unit purchased from A.E.C.L. for use in Rio—Rio de Janeiro.

Fish

CHILE—Fish production in Chile for 1958 totalled 171,800 tons, compared with the previous year's total of 157,500. Shellfish production decreased from the 1957 figure of 56,000 tons to 54,000 in 1958—Santiago.

URUGUAY—Servicio Oceanografico y de Pesca, a government-controlled enterprise, has ordered all the fishing boats under its control to make every effort to exceed their normal catch. As a result, unusually large quantities of fresh fish are on hand to ease the serious food shortage caused partly by the recent floods—Montevideo.

Frozen Foods

SWEDEN—The Swedish-Danish-Norwegian company Findus International reports that its sales of deep-frozen foods are growing satisfactorily in Europe and that it will probably have to expand soon to cope with demand. Its frozen foods have been selling well in the United Kingdom in particular, where sales of deep-frozen fish and peas climbed by 50 per cent over last year. Findus foods are also doing well in the rest of Europe, particularly in Austria. The company recently introduced several new products on the U.K. market, including Swedish meatballs and Italian specialties such as ravioli and pizza; the latter is made by Findus in Rome.

The Swedish frozen storage company Helsingborgs Frys has established a branch plant in Grimsby, England—Northern Cool Storage Ltd.—that has introduced completely new frozen storage methods into

the U.K. The plant is now ready for use and can freeze and store 10,000 tons of food; most of its storage space has already been rented—Stockholm.

Generators

BRAZIL—The tender to supply four 160 thousand kw. generators at the huge Furnas power project in the State of Minas Gerais has been awarded to the German firm, Siemens & Halske AG. The first generator is scheduled to come into operation in 1962. The purchase has been financed by the US$73 million loan granted last year by the World Bank—Rio de Janeiro.

Iron Ore

VENEZUELA—Production of iron ore in Venezuela reached a new record in 1958. Output for the year totalled 15,442,309 metric tons, of which 83.5 per cent was from the Orinoco Mining Company (U.S. Steel) and 16.5 per cent from Iron Mines de Venezuela (Bethlehem Steel). Some 12.4 million metric tons of ore were exported to the United States, 1.3 million to Britain, 1.2 million to West Germany, and 539 thousand to Italy—Caracas.

Iron and Steel Sheeting

BRAZIL—Minasfer, S.A. has started building its plant in Belo Horizonte's industrial city. When completed the plant will turn out 60,000 tons of iron and steel sheeting a year—Rio de Janeiro.

Kraft Paper

SWEDEN—Scankraft has decided to retain the same export prices for kraft paper, but will reduce the present 25 per cent decrease in production to 20 per cent for the third quarter of 1959.

Pulp export prices will remain unchanged during the third quarter. Smaller pulp production is planned for the whole year and will not be modified unless there is a marked improvement in the market—Stockholm.

Sea Island Cotton

INDIA—A scheme to grow sea island cotton commercially in the States of Kerala and Mysore on India's southwestern coast, launched in 1957, has proved successful.

The 126 acres under cultivation in 1958 have increased to 1,600 acres in 1958-59 and may be extended to 20,000 in 1959-60. By 1963 it is hoped to reach the target of 300 thousand acres with an annual yield of 225 thousand bales (392 lb.). This should meet the entire needs of the Indian textile industry and save the country $61 million in foreign exchange currently being spent on imports of extra long staple cotton.

At an auction sale of the 1958-59 crop, prices varied from $579 to $713 per candy (784 lb.) on 170 bales to $54 a candy on 30 bales of an inferior quality of yellow lint—Bombay.

Sugar

FRENCH WEST INDIES—Guadeloupe produced 117 thousand tons of sugar in 1958 and Martinique 70,000. Both crops fell far below estimates for the year. Plentiful rainfall which, in fact, boosted the cane crop to what would have been a record, persisted through grinding operations and much of the crop was left standing in the fields.

A record cane crop of over 1.5 million tons, which should yield about 140 thousand tons of sugar, is estimated for Guadeloupe in 1959. Martinique expects to produce 70,000 tons of sugar this year—Pointe à Pitre.

Television Sets

WEST GERMANY—There are now over 2.7 million registered television sets in West Germany and the number is going up rapidly. West Germany currently ranks fifth in number of sets, following the United States, the United Kingdom, Canada and the Soviet Union—Bonn.

Textiles

AUSTRALIA—A Japanese firm and a Sydney group are planning to build a new textile factory in Moe, Victoria. This marks the first time Japanese capital has ever been invested in Victorian industry. It is expected that the plant will provide employment for between 130 to 180 persons. The Victorian Minister for State Development has stated that other Japanese interests are negotiating for the establishment of other types of plants in Victoria—Melbourne.

Tractors

BRAZIL—In 1958 the Superintendencia da Moeda e do Credito made an allocation of US$24 million in inconvertible currencies for imports of tractors and agricultural machinery from Czechoslovakia, Hungary, Yugoslavia, Romania, Poland, Finland, Sweden and Denmark. However, only US$14.2 million was actually taken up and import licences were distributed as follows: Poland US$3 million, Czechoslovakia US$3 million, Finland US$3 million, Sweden US$2 million, Denmark US$1.8 million and Hungary US$1.5 million. Licences were issued for 4,017 tractors and 3,209 implements.

Imports of such machinery are usually made with 80 per cent of the cost on medium-term credit, and distributors' sales to farmers are payable over three years. Allocations are being distributed through the Commis-

sion for the Mechanization of Farming, after the machinery has been tested and approved by the Ministry's experimental farm at Ipanema, State of São Paulo—São Paulo.

Whale Oil

NORWAY—The nine Norwegian whaling expeditions operating in the Antarctic this season produced 706,445 barrels of whale oil, 22,555 barrels less than last season. Sperm oil totalled 83,849 barrels, a decline of 37,751. Only twice during the past ten seasons (in 1954 and 1955) has Norway's whale-oil output been lower than this year.

Most of the oil was sold at a price of £72/10 per ton, and several lots of 9,500 tons were sold for between £74 and £75 per ton; the remaining 20,700 tons fetched as much as £78. Last year the average sale price for whale oil was £72 per ton—Oslo.

Trade Commissioners on Tour

The following officers of the Trade Commissioner Service are undertaking tours in Canada. Their itineraries are:

S. V. ALLEN, Deputy Consul General (Commercial), in New York:

Ottawa—Aug. 3-7
Montreal—Aug. 10-14
Toronto—Aug. 17-22
Vancouver—Sept. 14-17

N. W. BOYD, formerly Assistant Commercial Secretary in Berne, Switzerland:

Vancouver—July 23-August 7

When he completes his tour Mr. Boyd will be posted to Tokyo, Japan, as Assistant Commercial Secretary.

P. T. EASTHAM, Assistant Commercial Secretary in Port-of-Spain, Trinidad:

Vancouver—Aug. 3-5

When he completes his tour Mr. Eastham will be posted to Brussels as Assistant Commercial Secretary.

H. J. HORNE, Commercial Secretary in Karachi, Pakistan:

Winnipeg—Aug. 5

Mr. Horne is being transferred to Chicago as Consul and Trade Commissioner and is expected to arrive there early in August.

K. F. OSMOND, Commercial Secretary in Rome, Italy:

Montreal—Oct. 1-16

C. O. R. ROUSSEAU, Commercial Secretary in Beirut, Lebanon:

Montreal—Aug. 31-Sept. 4
Toronto—Sept. 8-14
Hamilton—Sept. 15
Winnipeg—Sept. 17-18
Vancouver—Sept. 21-23

R. CAMPBELL SMITH, Commercial Counsellor in Paris, France:

Vancouver—Sept. 16-18

R. K. THOMSON, Commercial Secretary in Vienna, Austria:

Ottawa—July 27-Aug. 7

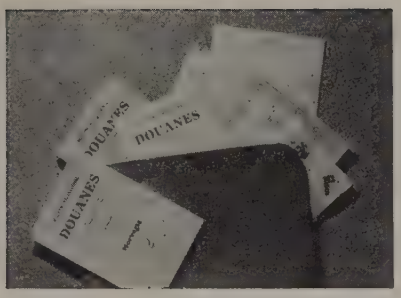
Businessmen who wish to see these officers should get in touch with the Board of Trade or Chamber of Commerce in the cities mentioned, with the following exceptions. In Toronto, Winnipeg and Edmonton, the Trade Commissioners make their headquarters at the offices of the Canadian Manufacturers Association; in Windsor, Ontario, at the offices of the Greater Windsor Industrial Commission; in St. John's, Ottawa and Vancouver, at the Department of Trade and Commerce; in Victoria, at the Department of Trade and Industry, and in Fredericton at the Department of Industry and Development.

Tours of Territory

M. P. CARSON, Trade Commissioner in Singapore, will visit Rangoon, Burma, from August 10-15, and North Borneo, Sarawak and Brunei from September 12-15.

P. V. McLANE, Commercial Counsellor in Athens, Greece, began a visit to Israel on July 27 and will remain there for about ten days.

Businessmen who would like these officers to undertake assignments should get in touch with them at their posts as soon as possible. Write to Mr. Carson at Singapore and to Mr. McLane at Athens.



Trade and Tariff Regulations

Barbados

DOLLAR RESTRICTIONS LIBERALIZED—The Barbados Controller of Supplies has announced that, effective July 1, licences will be issued freely for all goods imported from dollar countries, except the following for which licences will be granted only in essential cases:

Air-conditioning machines, self-contained, comprising elements for cooling, control of humidity, cleaning and circulating of air.
Centrifugal drying and separating machines, other than of a kind used for domestic purposes.
Compressors and exhausters, air and gas.
Dredging equipment.
Gas and chemical plant.
Lifting, hauling and transporting machinery, the following: hoists, winches, pulleys.
Motor vehicles and spares.
Oil-refining plant.
Pile drivers.
Pumps of all kinds, including petrol and oil-measuring pumps, other than of a kind used in motor vehicles, ships, boats or aircraft, or for domestic purposes.
Refrigerators and refrigeration machinery, other than of a kind used for domestic purposes.
Separators for separating oil from mixtures of oil and water.
Welding machines.
Well-boring machinery and plant.
Cocks, taps, traps and valves for controlling gases, liquids or vapours.
Flexible tubing and piping wholly or mainly of metal.
Petroleum and shale oils, crude and refined (other than lubricating oils, waxes of all kinds including mixtures of waxes, wax residues, petrolatum and greases).
Wholly and semi-manufactured gold.
Manufactured foodstuffs, namely:
(1) Cereals (including rice); rice, whole or broken, and all edible rice products, including rice starch and flour.
(2) Fats and oils: all fats and oils (edible and non-edible), including shortening and margarines but excluding castor beans and castor oil, sperm oil, tung oil, oiticia oil and oil-bearing seeds, and soap.
Soapless detergents.
Coconut meal.
Cottonseed meal.

Burma

IMPORTS FROM DOLLAR AREA RELAXED—The Director of Imports and Exports to the Burmese Commissioner of Customs announced on June 4, 1959, that certain commodities, formerly permissible only from countries other than the dollar area, may now be imported into Burma from any country whatsoever, including the dollar area. The products affected by this new regulation include: building materials and general hardware goods; all sorts of provisions; requisites for sports and games; watches and clocks, spare parts and accessories thereof; tires, tubes and flaps of natural or synthetic rubber.

Under the import control regulations of Burma, importers have been issued import licences. It is the responsibility of Canadian exporters to establish connections with the registered importers in Burma. The Canadian Trade Commissioner in Singapore is responsible for Burma and can assist interested Canadian exporters of the above noted commodities.

Details of the import trade control regulations of Burma were published in "Foreign Trade" of June 20, 1959, page 44.

Federation of Malaya and Singapore

IMPORT CONTROLS RELAXED—The Governments of the Federation of Malaya and Singapore announced on July 14 that, effective August 1, goods may be imported from the dollar area under Open General Licence, with the exception of a small list of commodities for which specific licences will be issued freely.

Ghana

IMPORT CONTROLS—A cable dated July 15 from the Commercial Counsellor in Accra, Ghana, states that the following goods may be imported from the dollar area under Open General Licence: cash registers, tractors, earthmoving machinery, timber machinery, salmon and salmon trout, newsprint, road motor vehicles and spares.

Jamaica

IMPORT RESTRICTIONS LIBERALIZED—The Jamaican Trade Board has announced that, effective July 1, 1959, all goods (with the exception of those listed in the schedule below which are subject to individual licensing) may be imported under Open General Licence from any country in the non-sterling area other than from specified Communist countries.

GROUP I

1. Air-conditioning machines, self-contained, comprising elements for cooling, control of humidity, cleaning and circulating of air.
2. Centrifugal drying and separating machines, other than of a kind used for domestic purposes.
3. Compressors and exhausters, air and gas.
4. Dredging equipment.
5. Gas and chemical plant.
6. Lifting, hauling and transporting machinery, the following: hoists, winches, pulleys.
7. Oil refining plant.
8. Pile drivers.
9. Pumps of all kinds, including petrol and oil measuring pumps, other than of a kind used in motor vehicles, ships, boats or aircraft or for domestic purposes.
10. Refrigerators and refrigeration machinery, other than of a kind used for domestc purposes (see item no. 28, Group II).
11. Separators for separating oil from mixtures of oil and water.
12. Welding machines.
13. Well-boring machinery and plant.
14. Cocks, taps, traps and valves for controlling gases, liquids or vapours.
15. Flexible tubing and piping, wholly or mainly of metal.
16. Petroleum and shale oils, crude and refined (other than lubricating oils, waxes of all kinds including mixtures of waxes, wax residues, petrolatum and greases).

GROUP II

17. Aluminum holloware.
18. Butter.
19. Canned milk (evaporated and sweetened condensed milk).
20. Canned pineapples and pineapple juices.
21. Cement.
22. Clothing: foundation garments (including brassieres); outerwear (excluding leather coats and other leather clothing of plastics and rubberized oil and similar impregnable materials); stockings and hose (excluding ladies' stockings); ties; underwear and nightwear (excluding infant's bands, bathing suits, bathing trunks, bath robes, lounging robes and swim suits).
23. Coal.
24. Cocoa beans and cocoa powder (including cocoa and chocolate preparations containing not less than 50 per cent of cocoa powder).
25. Coconut meal.
26. Cornmeal.
27. Cottonseed meal.
28. Electrical equipment (frequency-sensitive) including: refrigerators and freezers (including home freezers, beverage coolers, water coolers, ice cream cabinets and refrigerators fitted with sealed refrigeration systems), washing machines, record players or phonographs (including juke boxes), clocks (electric mains), ranges (with timers), organs, oil burning furnace equipment, fans, dishwashers, sun lamps, fluorescent fixtures (complete), fluorescent ballasts, sewing machines (industrial), ironers (other than domestic), vacuum cleaners (other than domestic), food mixers (industrial), electric motors (except universal motors), radios—60 cycles only, and all other speed-sensitive, motor-driven equipment not mentioned above.
29. Fats and oils—all oil-bearing materials, vegetable, animal and marine fats and oils (edible and inedible), including manufactured products of which the principal component is fat (such as margarine, shortening and soap), and excluding animal ghee, flaxseed and linseed oil, tung nuts and oil, castor beans and oil, oiticia oil and perilla seed and oil, fish liver oils, sperm oil and other waxes.
30. Fibre suitcases.
31. Gold bullion and fully or semi-manufactured gold (including jewellery).
32. Ground black pepper.
33. Ice cream, frozen sherbets and frozen water-ices.
34. Leather.
35. Manufactures of plastic as per tariff items Nos. 899-07 and 899-11, but excluding films and sheets or other semi-manufactures thereof.
36. Milk-based infant and invalid foods.
37. Motor car tires.
38. Motor vehicles and motor vehicle spares.
39. Potatoes.
40. Radios.
41. Rice.
42. Slide fasteners.
43. Soap substitutes, including detergents recognized as soap substitutes.
44. Sugar (as sugar).
45. Textile fabrics.
46. Tobacco—manufactured (including cigarettes) and unmanufactured (excluding leaf tobacco).
47. Wheat flour, un-enriched.

GROUP III

48. Arms and ammunition.
49. Eggs, in shell.
50. Toilet paper.
51. Coffee and imitations of.
52. Footwear.
53. Metal furniture of all kinds.
54. Paints and enamels.
55. Cordage and twine.
56. Mattresses.
57. Gramophone and phonograph records.
58. Poultry meats.
59. Fresh and frozen fish.
60. Jelly and dessert powder.
61. Electric accumulators.

Japan

TRADE WITH SOUTH KOREA SUSPENDED—On June 15, the Korean Mission in Tokyo announced suspension of South Korean-Japanese trade. Certificates of origin are not being approved by the Korean Mission except for business that had been confirmed or letters of credit issued before June 15. This decision was taken as a protest against Japan-North Korea talks on repatriation of Korean nationals resident in Japan. There are no indications of how long the trade suspension will remain in force.

As a result of this move, it is possible that more "spot" inquiries may be received for Canadian products from Korean trading firms. Japan has been Canada's principal competitor in the Korean market for ammonium sulphate fertilizer. However, the Republic of Korea Government has temporarily postponed further imports of fertilizer and it is unlikely that the suspension of trade, unless it goes on for a long time, will see a marked increase in Canadian exports to South Korea—Tokyo.

New Zealand

IMPORT CONTROLS—On June 29, 1959, the New Zealand Government liberalized import restrictions for the year 1959 on the items set out in the following table:

Tariff Item No.	Tariff Item or extract thereof	Previous Allocation	Amended Allocation
Ex 64	Rock salt	C	50% 1956 imports same goods
219 (1)	Glass, sheet, common window or plate, etc., (excluding safety glass)	100% 1958 licences	100% 1956 imports
290	Paper hangings	M 100% 1956 imports	M 112½% 1956 imports
300 (2) (b)	Paper, n.e.i., etc., in sheets of size not less than 20 inches by 15 inches, or the equivalent	M 100% 1958 licences	M 112½% 1958 licences
Ex 300 (2) (d)	Paper, n.e.i., etc., in rolls, n.e.i. excluding newsprint	"	"
Ex 352	Outboard motors	C	50% 1957 imports same goods

Note: Separate licences will be issued for outboard motors
(a) up to and including 7½ h.p.
and (b) exceeding 7½ h.p.

Licences for outboard motors exceeding 7½ h.p. will be endorsed to the effect that it is expected that the licence-holder will make reasonable provision for the requirements of the commercial fishing and boatbuilding industries from imports under the licence.

Explanatory Notes:

. *Items marked with a percentage of 1958 licences:*

Licences will be granted for the indicated percentage of the *value of licences** granted for imports of similar goods from all sources during the 1958 licensing period.

*Not including licences granted in special circumstances (e.g. replacement of licences for an earlier period, "EXCESS" licences, no-remittance licences, special orders, etc.)

. *Items marked with a percentage of 1957 or 1956 imports:*

Licences will be granted for the indicated percentage of the value of imports made by the importer in his own name *from all countries* during the calendar year specified.

Items marked "C":

Goods for which licences are considered individually.

Items marked "M":

Separate allocations for the dollar and non-dollar areas will be made for these items and licences will be issued to the dollar area on the same basis as that which applies to non-dollar licences for the same goods. This means that if an item appears in the Licensing Schedule as "M-100%/1958 licences", the allocation for imports from Canada, for example, will be 100 per cent of the value of 1958 licences issued for imports from this country.

South Africa

INVOICING REGULATIONS AMENDED—The South African Government has announced under Government Notice No. 926 dated June 19, 1959, that section 15 of the General Regulations in Terms of the Customs Act, 1955 has been amended by the addition of the following sub-paragraph:

. Any person who imports into the Union:
(2) from any country or territory any of the following class or kind of goods:
(a) women's new readymade outer clothing;
(b) women's underwear;
(c) ladies' hats;
(d) women's and girls' finished nylon stockings;
(e) men's and boys' finished socks and three-quarter hose;
(f) towels of woven terry towelling;
(g) woven terry towelling containing 50 per cent or more by weight of cotton;
(h) DDT and DDT products;
shall, when entering such goods on importation, produce in respect of each separate consignment an invoice which shall show, in addition to the particulars prescribed in regulations 13 and 14, the ordinary market price at which such or similar goods have been sold in such territory during the six months preceding the date of exportation to the Union.

REPRESENTATIONS RESPECTING THE TARIFF —The South African Board of Trade announced recently that it had received the following representations respecting the tariff:

Increase in duty on:

1. (a) Printed woven cotton piece goods the f.o.b. price of which does not exceed 2s. per yd. and 11s. per lb. by weight of material to:

	Minimum Duty	Intermediate Duty	Maximum Duty
Ad valorem	5%	10%	15%
or			
per yard		1¼d.	3d.
whichever duty is the greater, and in addition			
Ad valorem	20%	20%	25%
or			
per yard	4d.	4d.	6d.
whichever duty is the greater, and in addition			
Ad valorem			10%

(b) Printed woven cotton piece goods the f.o.b. price of which exceeds 2s. per yd. but does not exceed 11s. per lb, by weight of material, to:

	Intermediate Duty	Maximum Duty
Ad valorem	25%	55%

(c) Printed woven rayon piece goods the f.o.b. price of which does not exceed 11s. per lb. by weight of material, to:

	Maximum Duty
Ad valorem	10%
or	
per yard	4d.
less	
Ad valorem	5%
whichever duty is the greater, and in addition	
	Maximum Duty
Ad valorem	25%
or	
per yard	4d.
whichever duty is the greater but excluding:	

(i) printed woven material of a width exceeding 45 inches (but including split woven prints, or wide prints, intended for splitting into individual widths not exceeding 45 inches);
(ii) all printed pile fabrics and printed raised fabrics.

2. (a) Conveyor belting for mining purposes,
(b) conveyor belting for industrial purposes,
(c) conveyor belting for other purposes, and
(d) bands and belting for driving machinery,
from various rates of duty to 25 per cent ad valorem in the intermediate columns and to 40 per cent ad valorem in the maximum column.

3. (a) Metal fittings for braces, from free of duty to 20 per cent ad valorem; and
(b) belt buckles, including scout buckles, from 10 per cent ad valorem to 15 per cent ad valorem.

4. Bitumen, from 10 per cent ad valorem (intermediate rate under Item 158(a)) and 20 per cent ad valorem (under Item 158(b)) to 30 per cent ad valorem or 4d. per imperial gallon, whichever is the greater, in both cases.
5. Sodium silicate in bulk, from free of duty to 15 per cent ad valorem.
6. Ready-mixed brake fluid from free of duty to 20 per cent ad valorem or 4s. per gallon, whichever is the greater.
7. The following types of glass containers under Tariff Item 160(d): medicine bottles, ampoules, food, jam and preserve jars and bottles, pomade pots and jars and other glass bottles except demijohns, carboys and siphons, from 5 per cent ad valorem to 25 per cent ad valorem.

Canadian firms exporting these goods to South Africa may wish to have their views on these tariff inquiries placed before the Tariff Board. The most effective method of doing so is for the Canadian exporter to have his South African agents act on his behalf. Action should be taken as soon as possible because tariff inquiries normally begin soon after they are announced.

West Germany

DOLLAR IMPORT LIBERALIZATION EXTENDED—The Canadian Commercial Counsellor in Bonn reports that various additional dollar imports into West Germany were freed from import restrictions and licensing requirements effective July 1, 1959. On the basis of his report, we have prepared the following list showing those liberalized which appear to be of interest to Canadian exporters. Information regarding the liberalization by Germany of particular products may be obtained from the International Trade Relations Branch.

This is the first step towards the removal of restrictions on a number of imports which the Government of the Federal Republic of Germany undertook to implement in stages at the recently concluded session of the Contracting Parties to the General Agreement on Tariffs and Trade.

Dead geese and ducks.
Salmon and sea trout, fresh, chilled or frozen.
Salted salmon.
Smoked fish.
Mushrooms, fresh or chilled.
Fresh spinach, carrots, celery, peas, Brussels sprouts and leeks.
Onions and shallots, excluding seeds.
Dehydrated potatoes.
Fresh grapes, peaches, cherries, plums, strawberries and raspberries.
Meal of rice, flakes and pearl of rice.
Malt flour.
Gluten of potatoes.
Hay, not ground.
Vegetable oils for human consumption, not treated.
Sausages and meat preparations of poultry without livers, in airtight containers.
Canned tuna.
Cocoa powder, sugar confectionery and chocolate articles.
Cornflakes, puffed rice and similar products.
Canned cucumbers, sauerkraut and mushrooms, without added vinegar or acetic acid.
Candied fruit peel.
Plum puree without added sugar.
Orange marmalade.
Canned fruits in containers weighing over five kilograms; canned pineapple regardless of weight.
Fruit juices, except apple and pear juices, without added sugar.
Mayonnaise and certain food preparations, including infant foods, peanut butter and cooked macaroni.
Soups and broths of meat other than beef, pork or mutton.
Ethylene glycol.
Poliomyelitis vaccine.
Organic surface active agents—washing preparations for the textile industry and for papermaking.
Polyethylene, copolymers, and copolymerization products, such as polyisobutylen and polyvinylpyrolidon.
Other plastic materials, such as linoxyn.
Articles of plastic.
Textile-covered rubber thread.
Bicycle, motorcycle and automobile tires.
Calfhide leather, sheep and lambskin leather, goat and kidskin leather.
Leather for driving belts; industrial leathers.
Various kraft papers and paperboard.
Flax.
Fishing nets of hemp.
Felt cloths of cotton, wool and synthetic or artificial textile fibres.
Yarn and thread of jute.
Terry fabrics, broche fabrics, cord fabrics of cotton for tires.
Grinding wheels and diamond tools.
Glass pearls, glass stones, coloured spectacle glasses, small rounds of mother of pearl.

Departmental Reorganization

The Department of Trade and Commerce, in the interests of greater efficiency, has consolidated under the responsibility of the International Trade Relations Branch the separate Area Trade Desks formerly operated at Ottawa by the International Trade Relations Branch and the Trade Commissioner Service.

One desk within the department for each major trading area will constitute a more logical structure for Canadian businessmen and overseas visitors. It will also place the Department in a better position to deal with its increasing responsibilities in the field of trade policy.

In its reorganized form, the International Trade Relations Branch will now have some trade development functions as well as trade policy duties. The Branch will continue under the direction of Mr. Maurice Schwarzmann. Five Area Divisions and a General Relations Division have been established; for details, see the Head Office Directory on page 29 of this issue.

The consolidation involves no change in the responsibilities of the Commodities Branch and the Agriculture and Fisheries Branch; Commodity Officers will continue to be an important point of contact for the Department with Canadian businessmen.

Department of Trade and Commerce, Trade and Commerce Bldg., Wellington St.*

Head Office Directory

	Gov. Local
Minister: The Honourable Gordon Churchill	2-0336
Private Secretary and Executive Assistant: Mrs. Rita Cook	2-0336
Deputy Minister: John H. English	2-2888, 2-5838
Executive Assistant: A. G. Kniewasser	2-2380
Economic Adviser: O. J. Firestone	2-4176
Associate Deputy Minister: James A. Roberts	6-8431, 6-8502
G. S. Hall	6-8539
A. R. Winship	6-8539
Assistant Deputy Minister (Trade Promotion): H. Leslie Brown	2-2530, 2-0798
Assistant Deputy Minister (Trade Policy): J. H. Warren	2-4042, 2-2649

Administration Branch

Comptroller-Secretary: Finlay Sim	2-2262
Administrative Assistant: Miss M. L. E. Jones	6-7411
Financial Assistant: S. B. Kayes	2-4312

Personnel Division

Chief Personnel Officer: L. J. Rodger	2-5430

Office Services Division

Chief: C. Drolet	2-5011

Agriculture and Fisheries Branch

Director: G. R. Paterson	2-4301
Assistant Director: S. C. Hudson	2-5830

Fisheries Division

Chief: T. R. Kinsella	6-7385
J. M. Bellemare	6-7385

Food and Agriculture Division

Chief: G. E. Woollam	2-0914
Assistant Chief: K. L. Melvin	2-3172
Furs, Non-Alcoholic Beverages: D. H. Burns	2-4161
Grocery and Confectionery Products: J. E. Lancaster	6-6350
Livestock, Animal Products: K. L. Melvin	2-3172
Plant Products: A. J. Stanton	6-7523
Edible Fats and Oils, Tobacco: B. E. Husband	2-4161

Grain Division

Chief: S. C. Hudson	2-5830, 2-5648
Assistant Chief (Administration): R. M. Esdale	2-5830, 2-5648
Co-ordinator Markets Development: W. F. Hillhouse	6-7036
Assistant, International Programs: A. R. A. Gherson	6-7036

**Unless otherwise noted, all offices of the Department are in this building. Cable address: COMAGENT, Ottawa. If you are telephoning from out of town, call the government switchboard, CEntral 2-8211, and ask for the local; if you are in Ottawa, dial 9, then the government local.*

Canadian Government Exhibition Commission 479 Bank Street

	Gov.	Local
Director: Glen Bannerman	6-7412,	2-3558
Administrative Officer: A. D. Simmons		6-6795
Assistant to Administrative Officer: F. J. Bradley		6-7818
Chief, Design Section: T. C. Wood		2-3671
Assistant Chief, Design Section: G. E. Stranks		2-3682
Superintendent of Exhibits: R. L. Greene		2-3524
Assistant Superintendent of Exhibits: J. Rachlis		2-3524
Accountant: J. A. Cryderman		2-3776

Colombo Plan Administration (see Economic and Technical Assistance Branch)

Commodities Branch

Director: Denis Harvey	2-5417
Assistant Director: E. C. Thorne	6-7163
Assistant to Director: C. J. MacCallum	6-6519

Commodity Divisions

Chemicals Division

Chief: A. M. Tedford	2-5993
Assistant Chief: G. E. McCormack	6-7601
Oils, Fats, Miscellaneous Chemicals: G. R. Gough	2-2905
Pharmaceutical Products: G. A. Ferguson	2-5177
Petroleum, Organic Chemicals: T. V. Harquail	6-6075
Plastics, Heavy Chemicals: G. E. McCormack	6-7601

Consumer Goods Division

Chief: D. G. W. Douglas	6-6197
Assistant Chief: A. C. Fairweather	6-7815
Beverages: A. C. Fairweather	6-7815
Business Equipment, Radio and Television, Scientific Instruments, Hospital Equipment: R. P. Vachon	6-6958
Consumer Durable Goods, Electrical Appliances: W. H. Grant	2-3209
Handicrafts, Chinaware, Jewellery, Photographic Equipment: P. E. Jensen	2-5337
Hardware, Plumbing and Heating Equipment: D. C. Meyers	6-6383
Leather, Rubber and Plastic Products: W. L. Herman	2-0518
Recreational Supplies, Musical Instruments, Toys: P. G. Jones	2-4160
R. A. Drouin	6-7956
Ladies' Wearing Apparel, Linens: E. G. Gerridzen	2-5378
Textile Fibres and Fabrics, Miscellaneous Men's Wearing Apparel, Jute Products, Wastes: R. M. Josephson	2-3004
Records, Statistics, Office Services: Miss M. E. O'Connor	6-8760

Engineering and Equipment Division

Chief: R. A. Frigon	2-4082
Consulting Engineering, Aerial Surveying, Nuclear Energy: R. A. Frigon	2-4082
Engineering Projects, Construction Contracting, Industrial Electrical Equipment: R. C. Wallace	2-5382
Process Plants and Light Industrial Equipment: F. T. Carten	2-5859
Agricultural and Automotive Equipment, Vehicles, Aircraft, Ships, and Railway Rolling Stock: G. C. Clarke	2-3873
Machine Tools and Heavy Industrial Machinery: J. R. Johnson	6-7546
Communications and Electronic Equipment: D. L. Draper	6-6479

Forest Products Division

Chief: J. C. Dunn	2-0273
Assistant Chief: M. N. Murphy	6-6974
Logs, Round Materials and Lumber: J. C. Dunn	2-0273
Manufactured Wood Products: O. Hickie	2-4863
W. G. Huxtable	2-5811
Wood Pulp, Newsprint and Other Papers: M. N. Murphy	6-6974
Paper and Paper Products: E. J. Ward	2-5127

Commodities Branch (continued)

Gov. Local

Metals and Minerals Division

Chief: J. M. Rochon 6-8422
Assistant Chief: G. W. Rahm 2-5159
Iron and Steel: G. W. Rahm 2-5159
Non-Metallic Minerals: R. P. Mulvihill 2-5823
Non-Ferrous Metals: R. J. Hurley 2-3823
Statistics: W. L. Power 2-3823

Transportation and Trade Services Division

Chief: G. M. Schuthe 6-6236
Assistant Chief: H. A. Hadskis 2-2737
Transportation and Communications Section:
Chief: 2-2737
Traffic: D. H. Munro 6-7835
Export and Import Permits Section:
Chief: J. G. MacKinnon 2-3640
Processing Officer, Exports: L. M. Lang 6-6976
Assistant Processing Officer, Exports: Miss M. T. Langille 6-7834
Processing Officer, Imports: R. T. Traversy 6-6991
Directories Section:
Chief: R. W. Bedard 6-6681
B.W.I. Trade Liberalization Plan and U.K. Token Import Plan Section:
Chief: G. L. Tighe 6-6905, 2-5670

Economic and Technical Assistance Branch

Director: O. E. Ault 6-8495
Assistant Director: 6-8495
Capital Projects Division
Chief: F. E. Pratt 6-8429
Program Planning Division
Acting Chief: E. E. Smith 2-0981
Technical Co-operation Division
Acting Chief: G. J. Harrower 2-3612
Assistant Chief (Training): J. T. Hobart 6-8662
Assistant Chief (Program): I. A. Hodson 2-5542
Finance and Administration Division
Chief: J. H. Marshall 2-2551

Economics Branch

Director: V. J. Macklin 2-5658
Assistant Director: D. J. Daly 6-8900
Assistant to the Director: Miss J. E. Leitch 2-3575
Foreign Trade: P. C. Collingwood 6-7667
Capital Investment: J. H. Latimer 2-5711
Domestic Industries: E. Westbrook 2-3847
Resource Industries: A. M. Coll 6-7408
Area Studies: H. R. Smale 2-5266
Econometrics and Development: T. M. Brown 6-8288

Energy Studies Branch

Director: Douglas M. Fraser 6-6208

Industrial Development Branch

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Research Division
Chief: W. M. Hall 2-4143
New Products Division
Chief: G. A. Cooper 2-4181
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Chief: G. P. Bourne 2-5909
Assistant Chief: A. J. Wibe 6-6925
Regulations and Publications Division
Chief: J. H. O'Connell 2-3713

International Trade Relations Branch

	Gov. Local
Director: M. Schwarzmann	2-2250, 2-2981
Assistant Director: R. E. Latimer	2-2981
Assistant Director: V. L. Chapin	6-7594
General Relations Division	
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J. R. Downs	2-5642
W. Lavoie	6-7696
H. V. Jarrett	6-7696
Miss H. M. Spence	6-7696
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W. D. Wallace	2-2144
J. M. H. Davison	2-2144
Commonwealth Division	
Chief: A. W. A. Lane	2-2421
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A. R. Porter	2-3920
(General) R. W. Blake	2-0436
(Other Comm.) R. B. Nickson	2-0436
J. W. Latimer	2-3920
Miss M. V. McCormick	2-0436
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Chief: W. G. Pybus	6-8727
F. P. Weiser	6-6531
Mrs. I. F. Budge	6-6531
M. O. A. Krupka	2-3701
Latin American Division	
Chief: C. E. Butterworth	6-7641
A. M. Baldwin	6-7641
United States Division	
Chief: G. A. Browne	2-5176
B. S. Shapiro	6-8469
J. B. O'Neill	6-8469

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T. E. Bocking	2-5207
S. G. Barkley	2-5207
F. X. Wildgen	6-7573

Standards Branch **Standards Building, Holland Ave., Tunney's Pasture**

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Assistant Directors	
Electricity and Gas: E. F. Power	2-2956
Weights and Measures: C. S. Phillips	2-2000
Precious Metals Marking, and Enforcement: G. R. Lewis	6-7075

Standards Building, Holland Ave., Tunney's Pasture

Supervisor, Standards Laboratory: W. J. S. Fraser	2-2575

Trade Commissioner Service

Director: H. Leslie Brown	2-2530, 2-0798
Assistant to the Director: P. A. Savard	2-2242
Assistant Director (Trade Promotion): T. J. Monty	6-8286
Assistant Director (Personnel): G. F. G. Hughes	6-6800
Assistant Director (Administration): W. J. Millyard	2-5669
G. F. Farrow	2-5717
Western Representative: K. F. Noble, 331 Marine Bldg., 355 Burrard St., Vancouver, B.C.	Mutual 1-7161
Newfoundland Representative: Stott Bldg., 123 Water Street, St. John's, Newfoundland	2698

Trade Fairs Abroad Office

	Gov. Local
Liaison Officer for Trade Fairs: K. G. Ramsay	6-8269
Geo. Hazen	2-4379

Trade Publicity Branch

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Assistant Director: J. Fergus Grant	2-2186
Editor, *Foreign Trade* and *Commerce extérieur:* Miss O. Mary Hill	6-6588
Editorial and Art Services Division	
Chief: F. R. Hamilton	6-6435

Translation Branch

Chief: Emile Boucher	2-2760

Dominion Bureau of Statistics Holland Ave.

Dominion Statistician: Walter E. Duffett	2-2529
Assistant Dominion Statistician: J. T. Marshall	6-7695
Assistant Dominion Statistician: S. A. Goldberg	2-5458
Senior Research Statistician:	2-3562
Consultant on Classification: N. L. McKellar	2-3437
Chief Administrative Officer: H. L. Allen	6-7368
Agricultural Division	
Director: C. V. Parker	2-4774
Business Finance Division	
Director: C. Scott	2-4052
Census Division	
Director: O. A. Lemieux	2-2088
Education Division	
Director: F. E. Whitworth	2-5933
Health and Welfare Division	
Director: F. F. Harris	6-6651
Industry and Merchandising Division	
Director: H. McLeod	2-2125
Information Services Division	
Director: C. C. Lingard	2-0418
International Trade Division	
Director: C. D. Blyth	6-8340
Labour Statistics Division	
Director: H. F. Greenway	6-7424
Mechanical Tabulation Division	
Director: A. B. McMorran	6-8232
Prices Division	
Director: L. E. Rowebottom	2-3913
Public Finance and Transportation Division	
Director: G. A. Wagdin	2-5396
Research and Development Division	
Director: F. H. Leacy	2-3071
Special Surveys Division	
Director: W. I. Moore	2-5570

Export Credits Insurance Corporation Birks Bldg., 107 Sparks St., P.O. Box 655

President and General Manager: H. T. Aitken	CE2-4828
Assistant General Manager: A. W. Thomas	CE2-4828
Secretary: T. Chase-Casgrain	CE2-4828
Economist: D. C. Taylor	CE2-4828
Underwriter: S. Garrett	CE2-4828
Credits Supervisor: C. A. Law	CE2-4828
Claims Supervisor: F. G. Reynolds	CE2-4828
Accountant: B. R. King	CE2-4828
Montreal Branch 607 St. James St. West	UN6-1268
Toronto Branch Rm. 1511, 55 York St.	EM4-5778

The following nominal quotations may prove useful in checking prices. Canadian traders should consult their banks before making any firm commitments.

Conversions into Canadian dollar equivalent and units of foreign currency per Canadian dollar have been made at cross rates with sterling or the United States dollar on the date shown.

Except when buying and selling rates are specified, the mid rates only are quoted. The buying rate is that at which the banks purchase exchange from exporters. The selling rate is that at which banks sell exchange to importers.

When several rates are indicated, the rate applicable depends on the commodity traded. Information on the rate for any specific commodity may be obtained from the International Trade Relations Branch, Department of Trade and Commerce, Ottawa.

Rates used exclusively in non-merchandise trading are *not* included in the table.

For conversion to United States dollar equivalent multiply by 1.0447274.

foreign exchange rates

Country	Unit	Type of Exchange	Can. dollar equivalent July 20	Units per Canadian dollar	Notes (See below)
Argentina	Peso	Free	.01123	89.05	(1)
Austria	Schilling		.03714	26.92	
Australia	Pound		2.1534	.4644	
Bahamas	Pound		2.6917	.3715	
Belgium, Belgian Congo and Luxembourg	Franc		.01918	52.14	
Bermuda	Pound		2.6917	.3715	
Bolivia	Boliviano	Free	.00008378	11,936.02	
British Guiana	Dollar		.5608	1.78	
British Honduras	Dollar		.6729	1.49	
Brazil	Cruzeiro	General Category*	.005351	186.87	*June 23 (2)
		Special Category*	.002918	342.64	
		Official selling	.05086	19.66	(3)
Burma	Kyat		.2010	4.97	
Ceylon	Rupee		.2019	4.95	
Chile	Peso	Free	.0009099	1,099.02	
Colombia	Peso	Certificate	.1495	6.69	(4)
Costa Rica	Colon	Official	.1705	5.86	
		Controlled free	.1052	6.95	
Cuba	Peso		.9572	1.04771	tax 2%
Czechoslovakia	Koruna		.1330	7.52	
Denmark	Krone		.1390	7.19	
Dominican Republic	Peso		.9572	1.04771	
Ecuador	Sucre	Official	.06382	15.67	
		Free	.05482	18.24	
Egyptian Region, United Arab Rep.	Pound	Official	2.7486	.3638	
		Export account selling	1.8675	.5355	
El Salvador	Colon		.3829	2.61	
Fiji	Pound		2.4250	.4124	
Finland	Markka		.002991	334.34	
France, Monaco and North Africa	Franc		.001951	512.56	(5)
French colonies	Franc		.003902	256.28	(6)
French Pacific	Franc		.01073	93.19	(7)
Germany	D Mark		.2270	4.40	
Ghana	Pound		2.6917	.3715	
Greece	Drachma		.03190	31.35	
Guatemala	Quetzal		.9572	1.04771	
Haiti	Gourde		.1914	5.22	
Honduras	Lempira		.4786	2.09	
Hong Kong	Dollar	Free*	.1658	6.03	*July 10
		Official	.1682	5.94	
Iceland	Krona	Official	.05877	17.01	(8)
India	Rupee		.2019	4.95	
Indonesia	Rupiah	Effective buying	.03161	31.63	*July 6
		Effective selling	.02529	39.54	(8)
Iran	Rial		.01263	79.14	

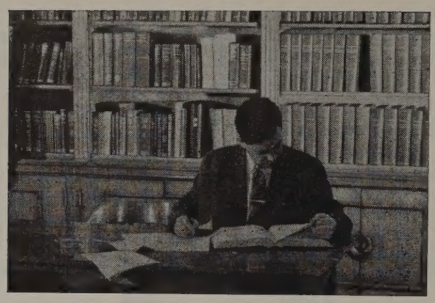
*Latest available quotation date.

Country	Unit	Type of Exchange	Can. dollar equivalent July 20	Units per Canadian dollar	Notes (See below)
Iraq	Dinar		2.6801	.3731	
Ireland	Pound		2.6917	.3715	
Israel	Pound		.5318	1.88	
Italy	Lira		.001543	648.09	
Japan	Yen		.002659	376.08	
Lebanon	Pound	Free	.3037	3.29	
Mexico	Peso		.07658	13.06	
Netherlands	Florin		.2538	3.94	
Netherlands Antilles	Florin		.5114	1.95	
New Zealand	Pound		2.6917	.3715	
Nicaragua	Cordoba	Effective buying	.1450	6.90	
		Official selling	.1359	7.36	
Norway	Krone		.1345	7.43	
Pakistan	Rupee		.2019	4.95	
Panama	Balboa		.9572	1.04771	
Paraguay	Guarani	Official	.007977	125.36	
Peru	Sol	Certificate	.03297	30.33	
Philippines	Peso		.4786	2.09	
Portugal & Colonies	Escudo		.03341	29.93	(9)
Singapore and Malaya	Straits dollar		.3140	3.18	
Spain and Dependencies	Peseta	Commercial selling	.02264	44.16	(8)
Sweden	Krona		.1851	5.40	
Switzerland	Franc		.2222	4.50	
Syrian Region, United Arab Rep.	Pound	Free	.2674	3.74	
Thailand	Baht	Free	.04558	21.94	(8)
Turkey	Lira	Effective selling	.1064	9.40	(8)
Union of South Africa	Pound		2.6917	.3715	
United Kingdom	Pound		2.6917	.3715	
United States	Dollar		.9571875	1.0447274	
Uruguay	Peso	Free	.09051	11.05	
		Basic buying	.6301	1.59	(8)
		Principal selling	.4566	2.19	
Venezuela	Bolivar		.2857	3.56	
West Indies Fed.	Dollar		.5603	1.78	(10)
	Pound		2.6917	.3715	(11)
Yugoslavia	Dinar	Official	.003190	313.48	(8)
		Settlement rate	.001514	660.27	

*Latest available quotation date.

notes

1. Argentina: Effective Jan. 1, 1959, a single fluctuating exchange rate was introduced. Exports are subject to retention taxes of either 10 or 20 per cent ad valorem under this system.
2. Brazil: exporters receive cruzeiros at official rate plus exchange premiums ranging from 18.70 to 48.64 cruzeiros per U.S. dollar, depending on product.
3. For imports of wheat, newsprint and petroleum, the effective rate of exchange is the official selling rate plus a surcharge of 61.18 cruzeiros.
4. Chile: free rate applies to exports and to imports, except prohibited imports. Chilean importers must deposit local currency in amounts ranging from 5 to 5,000 per cent, depending on product, prior to shipment of goods.
5. France: territory includes Algeria, Tunisia, Morocco, Guiana, Guadeloupe, Martinique.
6. Equatorial Africa, West Africa, Cameroons, Togoland, Somaliland, Madagascar, Reunion, St. Pierre and Miquelon.
7. New Caledonia, New Hebrides, Oceania.
8. Additional rates are in effect.
9. Portugal: approximately same rate for Portuguese territories in Africa.
10. Barbados, Trinidad, Tobago, Leeward and Windward Islands.
11. Jamaica.



Businessman's Bookshelf

Euromarket

Euromart Publications Ltd., Monthly, about 55-60 pages. £7 per year. (10 per cent reduction for cash with orders.)

LAST December, just as the Common Market was emerging, London launched a new business magazine. The publishers christened it *Euromarket* and put it out in three simultaneous and identical editions—in English, French and German. Editorial objectives, as expressed in the first number, are "to investigate the trends of economic development and reveal the significant pattern in research, production and marketing, relating economic progress within each country to the growth of European trade."

The first four numbers (it is issued once a month) maintain a high standard of content and layout and justify its claim to be "Europe's first international business magazine." Regular features include a businessman's guide to economic trends in Europe, brief profiles of European business leaders, and reports on leading industries. Progress in and the policies of the Common Market receive special attention.

Order from: Euromart Publications Ltd., 180 Fleet Street, London, E.C. 4.

Second Development Plan 1959-64

Ghana Development Commission. 124 pages. Free.

THE five-year, $454 million economic development program that Prime Minister Nkrumah announced in the spring of 1958 is outlined in this publication.

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Canadian firms interested in the program should write to The Permanent Secretary, Ghana Development Commission, P.O. Box M 39, Accra.

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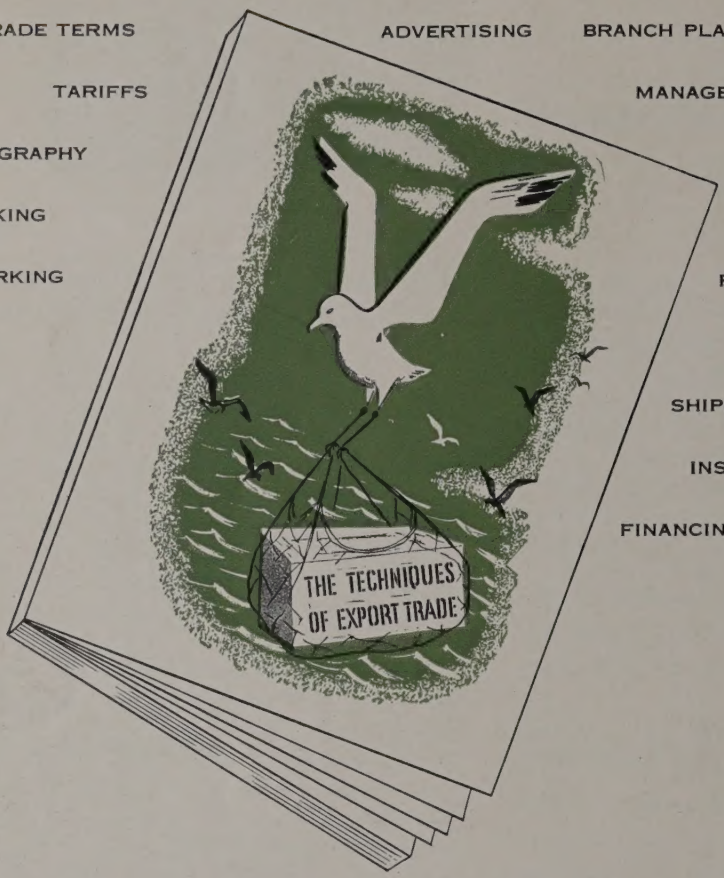

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